BUSINESS OBJECTS®

InfoView User's Guide

Windows, UNIX

BusinessObjects ™
InfoView User's Guide

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List of Examples

Finding the Information You Need

In this chapter

It's in the Documentation

Business Objects documentation continues to deliver timely and in depth coverage of product information. Not just facts about product features, but a world of knowledge in the way of tips, samples, and troubleshooting instructions.

For your convenience, Business Objects documentation comes in a variety of formats including Windows online help, HTML, Acrobat PDF, paper, and multimedia. What's more, you can gain quick access to it at any time directly from the product you are working with.

Documentation has been carefully designed to meet your needs for speed and ease of navigation. All the information you need is there just a few mouse clicks away.

The next sections highlight the key features of our documentation.

A Documentation Service on the Web

From the Help menu of all our products, you can check out More Tips and Samples, the Business Objects documentation service on the Internet. From here, you can discover the latest updates, tips, samples, and troubleshooting.

You can also get there by pointing your browser to the following URL:

http://www.businessobjects.com/services/infocenter

From the Tips and Tricks page, registered customer support contacts can explore the electronic version of the Business Objects documentation set. It offers extensive information on all Business Objects products, updates, troubleshooting, tips, and much more.

In addition, registered DEVELOPER SUITE customers can download new documentation and code samples.

Multimedia

Business Objects multimedia comprises the BUSINESSOBJECTS Quick Tour, the INFOVIEW Quick Tour, and the BUSINESSMINER tutorial, all of which cover the essential features of these products.

The BusinessObjects Quick Tour

The BUSINESSOBJECTS Quick Tour is a multimedia presentation that takes you on a guided tour of the key features of BUSINESSOBJECTS. Its didactic approach makes it an ideal primer for first-time users of the product.

You may wish to use it as an accompaniment to the guide *Getting Started with BusinessObjects*.

The InfoView Quick Tour

The INFOVIEW Quick Tour is a multimedia presentation that highlights the key features of INFOVIEW. Intended primarily for new users, it offers an overview of all the features necessary for managing and distributing documents.

The INFOVIEW Quick Tour can be used as an accompaniment to the guide *Getting Started with WebIntelligence*.

The BusinessMiner Tutorial

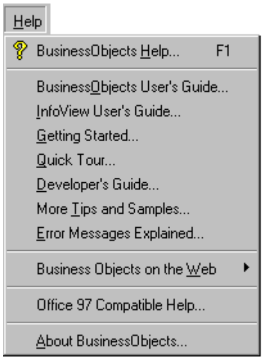
This multimedia tutorial teaches novice users how to use the powerful desktop datamining software, BUSINESSMINER. Each lesson in this tutorial has a narrated, animated presentation which shows users how to answer a business question using BUSINESSMINER. Users can then try out the demonstrated tasks themselves by following the step-by-step exercises in the accompanying guide.

Online Guides

User's Guides

All user's guides are available as Acrobat Portable Document Format (PDF) files. Designed for online reading, PDF files enable you to view, navigate through, or print any of their contents. The full list of Business Objects guides is provided in the *Deployment Guide*.

From a Business Objects product, you can open a guide from the commands of the Help menu.



The Help menu of BusinessObjects provides commands for viewing documentation.

During installation, the BUSINESSOBJECTS installer program automatically copies these files to:

Business Objects\BusinessObjects 5.0\Online Guides\En

You can open a document from the Help menu provided that you have installed the Adobe Acrobat Reader, version 3.0 or higher on your machine. This Reader is available on the Business Objects CD-ROM. You can also download it for free from the Web site of Adobe Corporation.

The Error Message Guide

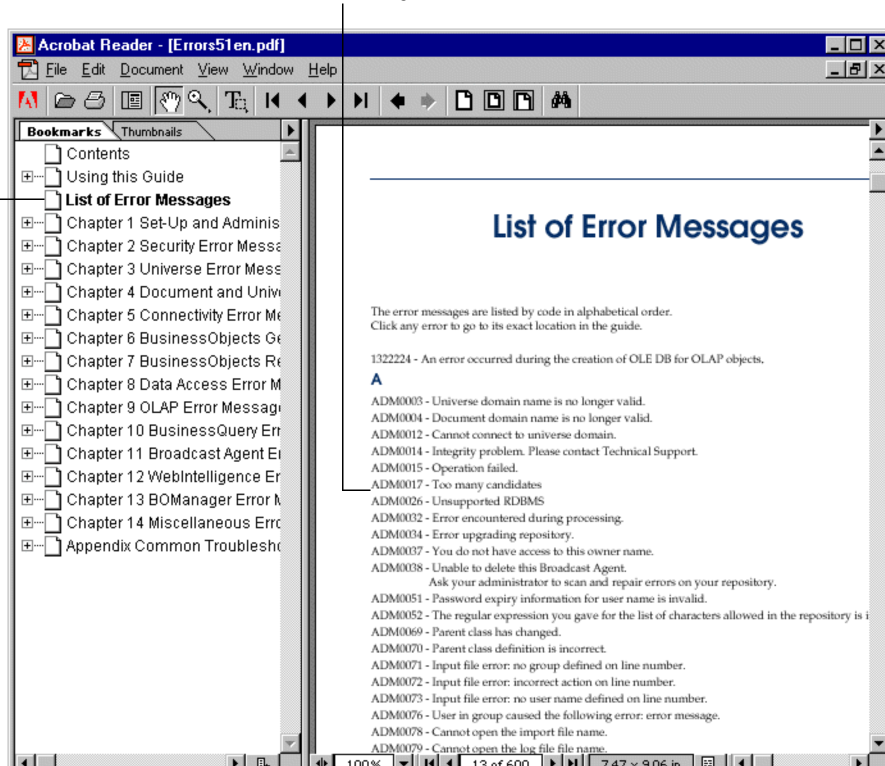
The *Error Message Guide* is a compilation of the error messages that can appear with ordinary use of Business Objects products.

This guide provides you with detailed troubleshooting information so that you can determine the reasons for an error and take the appropriate steps to resolve it. It allows you to search for error messages by code. Each error message appears with its probable cause and the recommended course of action.

You can open this online guide from any of the Business Objects products by selecting the Error Messages Explained command from the Help menu. From IINFOVIEW, click Error Messages in the navigation bar.

Click an error message to go to its explanation in the guide.

Click the List of Error Messages bookmark to view the error messages by code



The Error Message Guide in PDF format.

Online Help

For Business Objects Windows desktop products, online help is available in the form of .hlp and .cnt files that comply with the standards of Microsoft Windows online help.

From INFOVIEW, online help is available for both INFOVIEW and WEBINTELLIGENCE.

What to Do for More Information

If you cannot find the information you are looking for, then we encourage you to let us know as soon as you can. We welcome any requests, tips, suggestions, or comments you may have regarding the contents of this or other Business Objects documentation. You can contact us by e-mail at:

documentation@businessobjects.com

To find out information about Business Objects products and services, visit our Web site at:

http://www.businessobjects.com

About this Guide

This guide is about INFOVIEW, a BUSINESSOBJECTS product that provides an overview of all the documents that you can access in the corporate repository. It also allows you to view, manage, and distribute these documents.

You can view these document lists in two ways:

- In your Web browser over your corporate intranet, extranet, or the World Wide Web, using INFOVIEW.
  INFOVIEW is described in Part I of this guide.
- From your desktop using the BUSINESSOBJECTS Reader.
  This is described in Part II of this guide.

Note: At the end of each of these parts, you will find an index covering the information in that part of the book only.

Audience

The guide is intended for the end user who will be viewing and distributing documents.

For more information about BUSINESSOBJECTS and WEBINTELLIGENCE, see their User's Guides.

Conventions Used in this Guide

The conventions used in this guide are described in the table below.

Convention	How Used
Small capitals	The names of all products such as BUSINESSOBJECTS, WEBINTELLIGENCE, SUPERVISOR, DESIGNER.
This font	The names of BUSINESSOBJECTS classes, objects and conditions. For example, Customer, Sales, Revenue, Service, etc.
This font	Code, SQL syntax, computer programs. For example: `@Select(Country\Country Id)`
(...)	Placed at the end of a line of code, the symbol (...) indicates that the next line should be entered continuously with no carriage return.

Part I

Using InfoView in Your Browser

www.businessobjects.com/services/infocenter

Chapter 1 Introduction to InfoView

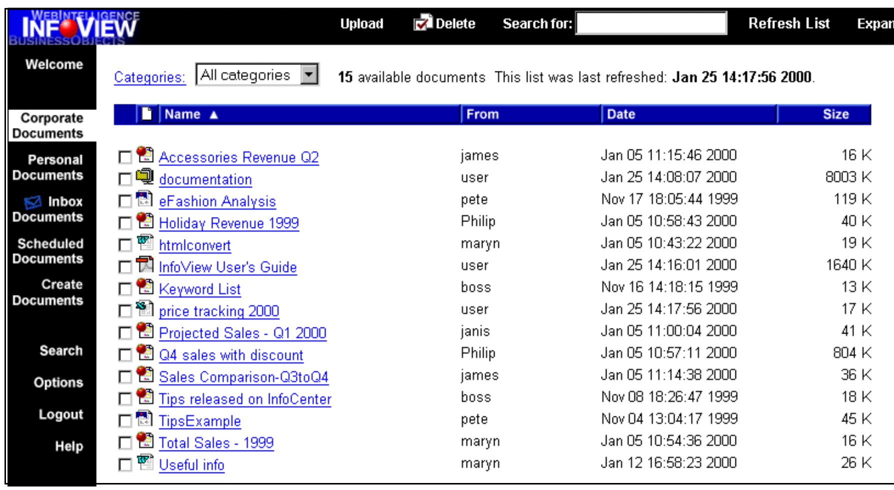
In this chapter

What is InfoView?

INFOVIEW is your personal gateway to your corporate information capital. It allows you to access documents generated from your corporate data storage from your office, home, or around the world, using your corporate intranet, extranet, or the World Wide Web.

To use INFOVIEW, you don't need to install any additional software on your computer. All you need is a standard Web or Internet browser.

At the core of INFOVIEW are the document lists that give you an instant overview of all the documents available to you in the corporate database.



INFOVIEW includes up to three document lists:

- The Corporate Documents page is a catalog of all the documents that you are allowed to access in the corporate *repository*, the centralized BUSINESSOBJECTS storage and distribution mechanism that manages universes, user information and document exchange.

  As long as you have the right to view a single corporate document, INFOVIEW contains this list.

- The Personal Documents page lists the documents you've saved for your own personal use.
- The Inbox Documents page shows you the documents that other users have sent you.

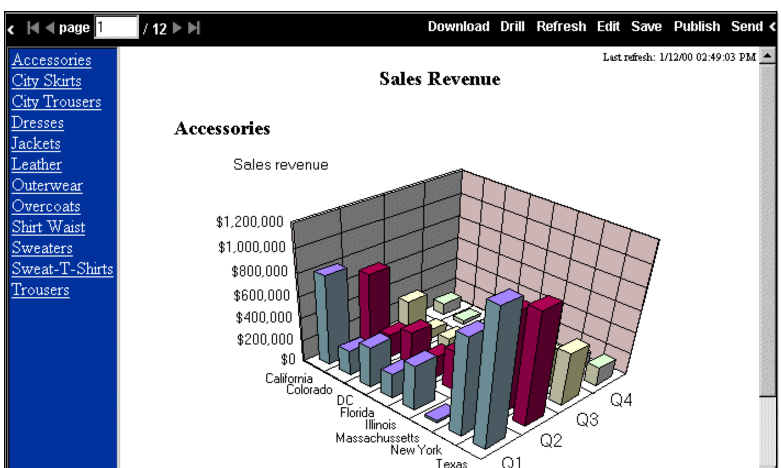
These lists not only keep you on top of all the documents likely to impact your work, but provide you with the means to view, update and manage those documents. You can save documents for your personal use, send them to other users, and publish them to the corporate repository for broader circulation.

What Documents Can You Access with InfoView?

INFOVIEW allows you to access documents that have been created using either WEBINTELLIGENCE or BUSINESSOBJECTS, and any other documents that are uploaded to the repository, such as Word documents, Excel spreadsheets, and PDF files. For information about how WEBINTELLIGENCE and BUSINESSOBJECTS documents are created, see “How are Documents Created?” on page 24.

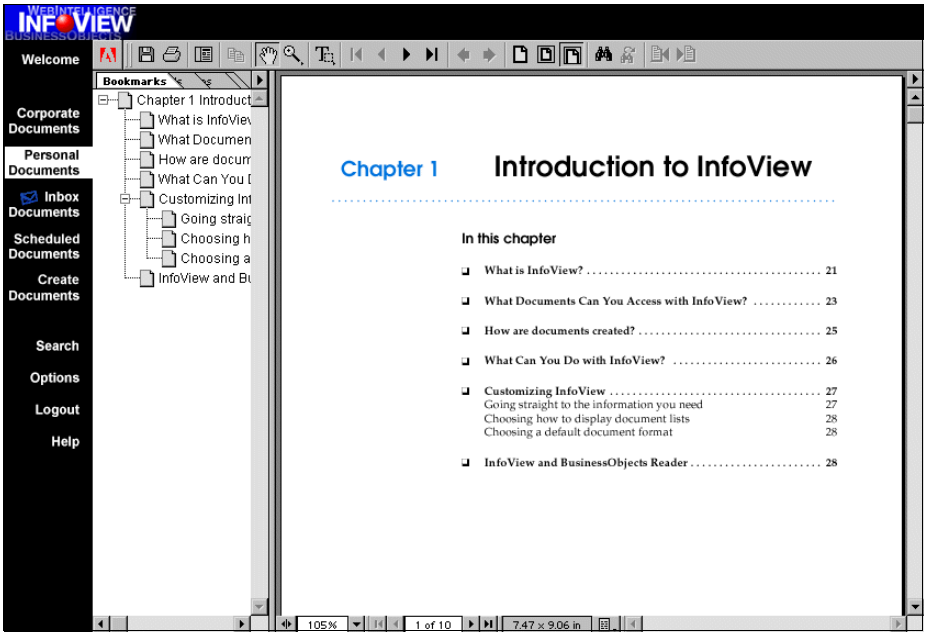
You can use INFOVIEW as your common entry point for viewing, managing, distributing, and downloading any document in your corporate repository.

The documents you view may contain simple tables or charts or complex documents with hyperlinked indexes created in WEBINTELLIGENCE, which allow you to navigate instantly between a document’s sections.

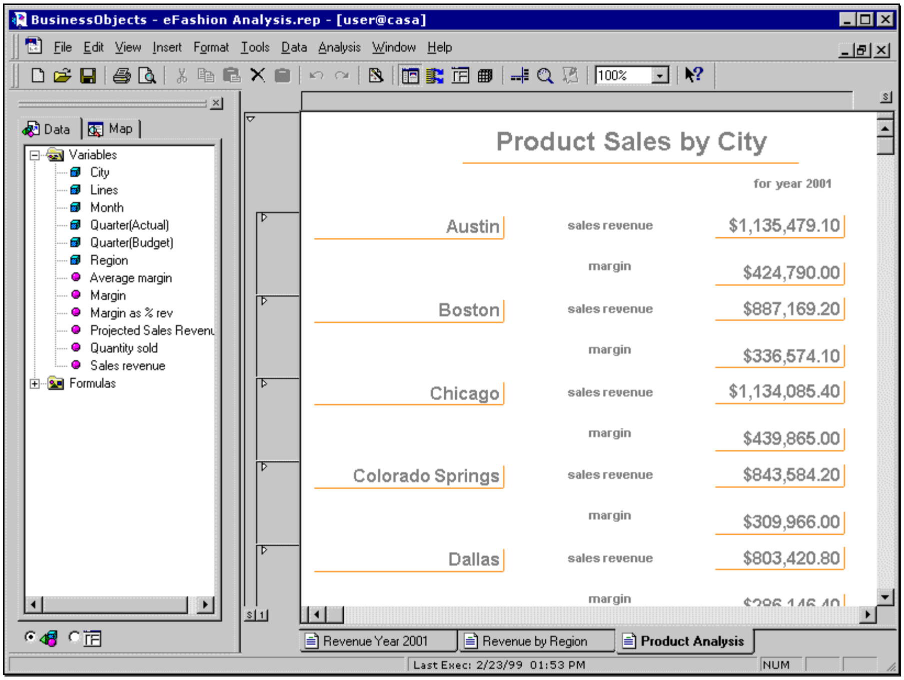


Because you’re using a Web browser, you may also read documents containing hyperlinked images and sound or video objects. For example, by clicking the name of a model in an imported car catalog, a document could launch a video showing a 360° view of the car, as well as its interior features.

You can view and edit documents that have been uploaded to the repository from other sources, such as a Word document, an Excel spreadsheet, or a document in Acrobat PDF format as shown below:



And, depending on your user rights, you may even be able to install BUSINESSOBJECTS from your browser to view, create and edit documents.



Note: The actions you may perform on a particular document or document type depends on your user rights. If you have a question regarding your user rights, ask your system administrator.

How are Documents Created?

WEBINTELLIGENCE and BUSINESSOBJECTS users use the same BUSINESSOBJECTS technology to query a database or data warehouse for the purpose of generating documents.

The two basic mechanisms in this technology are:

- The Universes used to build queries
- The Queries used to retrieve information from data storage

Universes

A universe is the business-intelligent semantic layer that isolates users from the technical issues of the database.

Universes are made up of *classes* and *objects*.

- Objects are elements that map to a set of data from a relational database in terms that pertain to your business situation.

  For example, the objects in a human resources universe might include Names, Addresses and Salaries.

- Classes are logical groupings of objects.

  For example, the objects listed above might belong to a class called Employees.

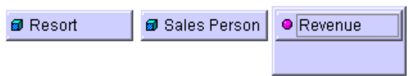
In your company or organization, universes are created by a universe designer, using BUSINESSOBJECTS DESIGNER. WEBINTELLIGENCE and BUSINESSOBJECTS REPORTER users then use these universes to access the data they need from the database through an intuitive, user-friendly interface.

Queries

If you have the right to create documents, you can build queries by adding objects from a universe to a document editor and organizing the objects so that the data is clearly displayed. When the users run the query, the data mapped to the objects in the query is retrieved from the database. A document is then generated using the data and formatting defined by the user who designed it.

Example **Running a query to retrieve data and generate a document**

The image below displays three objects that a document designer has added to the WEBINTELLIGENCE document editor. Each of these objects represents a unit of data that WEBINTELLIGENCE will retrieve from the database.



When the query is run, WEBINTELLIGENCE generates a document containing the following simple table:

Resort	Sales Person	Revenue
Bahamas Beach	Fischer	69,696.00
Bahamas Beach	Galagers	207,784.00
Bahamas Beach	Ishimoto	180,348.00
Bahamas Beach	Nagata	4,700.00
French Riviera	Fischer	69,240.00
French Riviera	Galagers	246,395.00
French Riviera	Ishimoto	226,275.00
Hawaiian Club	Fischer	94,950.00
Hawaiian Club	Galagers	288,960.00
Hawaiian Club	Ishimoto	238,260.00

Note: For more information about creating WEBINTELLIGENCE and BUSINESSOBJECTS documents, refer to the *WebIntelligence User's Guide* and the *BusinessObjects User's Guide*.

What Can You Do with InfoView?

All the rights you have as a user are granted by your BUSINESSOBJECTS supervisor using SUPERVISOR. The supervisor defines:

- The parts of the INFOVIEW interface you can access.
  If required, your supervisor can restrict the availability of INFOVIEW functionality, such as access to particular document lists, publishing, etc.
- Your database connections
- The document domains you can access in the repository
  This includes both reading corporate documents stored in those document domains, and publishing documents to those domains

The rights accorded each user define the user's profile. It is this profile-based security system that allows a single document to be distributed to many users -- with end users having access only to the information that they are authorized to see.

Customizing InfoView

You can maximize your efficiency by personalizing INFOVIEW to conform to and even enhance your working habits. Here are some ideas to get you started.

Going straight to the information you need

Waste no time getting down to the vital tasks you perform most often. Here's an example of how to go straight to the information you need. You can set up My InfoView to instantly show you the information you need by dividing the browser window into several panels, each displaying different information.

Example **Always viewing the most important information first**

If your job centers around sales strategy, analysis of the latest sales figures from your company's branches throughout the country is crucial to your work. You may therefore want to set My InfoView to display, a web page showing you how your company is doing in the stock market, Ca particular document from the Corporate Documents list showing the sales figures that are updated daily, and your Inbox Documents list so you can quickly access the documents sent to you by other people in your company. Your page would look similar to this:

To find out how to set up My InfoView, refer to "Configuring My InfoView" on page 51.

Choosing how to display document lists

Decide whether you want your document lists displayed in Compact mode -- thus displaying more document titles per view -- or in Expanded mode to include both more information about each document, and a range of instant action links. For more information, refer to "Compact or expanded document list display" on page 41.

Choosing a default document format

The default format in which you view BUSINESSOBJECTS documents depends on the browser and the operating system you use. If you want to be able to view BUSINESSOBJECTS documents exactly as they appear in the BUSINESSOBJECTS product, but don't have access to BUSINESSOBJECTS, you can choose either *Enhanced document format* or *PDF Acrobat Reader*. Both of these formats allow you to take advantage of WYSIWYG (What You See Is What You Get) printing. You can also choose to view BUSINESSOBJECTS documents in *Standard HTML format*.

To find out how to set a default document format in INFOVIEW, refer to "Selecting how you want to view BusinessObjects documents" on page 59.

InfoView and BusinessObjects Reader

BUSINESSOBJECTS READER lets you view, refresh and distribute BUSINESSOBJECTS documents directly from your desktop. It has the advantage of allowing you to work with BusinessObjects documents in offline mode, i.e., no network or web connection is required. You can also view unformatted versions of WEBINTELLIGENCE documents in BUSINESSOBJECTS READER.

INFOVIEW is the Web interface to your business information, whereas BUSINESSOBJECTS READER provides access to information from your desktop. Part One of this guide explains how to use INFOVIEW to view and manage documents, and Part Two explains how to use BUSINESSOBJECTS READER.

For more information on what you can do with BUSINESSOBJECTS READER, refer to "Introduction to BusinessObjects Reader" on page 145.

Chapter 2 Getting Up And Running

In this chapter

Checking Your Browser Configuration

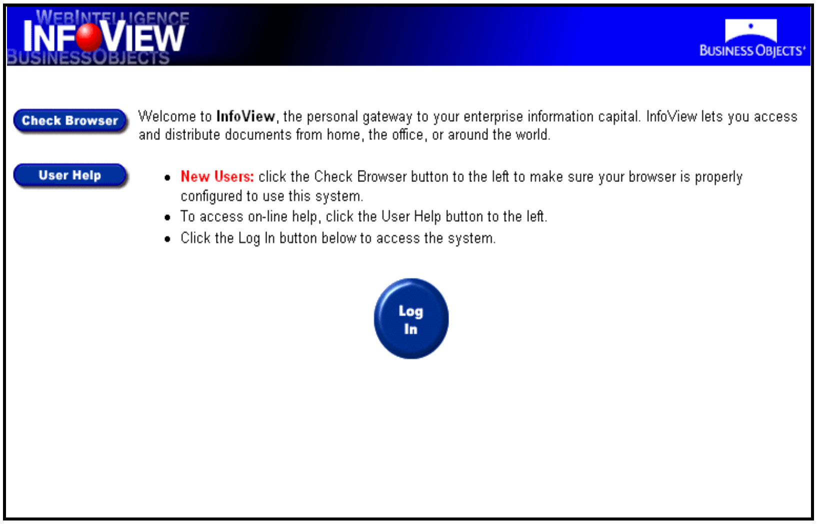
For InfoView to run correctly, you need to make sure your browser configuration is adapted to InfoView use. For example, your browser needs to be cookie enabled so that you can log in.

You should run an automatic check for any potential configuration problems *before* you log into InfoView for the first time. If your browser is not supported by InfoView, click Supported Browsers in the Browser Check page. This page contains a list of supported browsers and the links to the web pages where you can download the browser you need.

To check your browser:

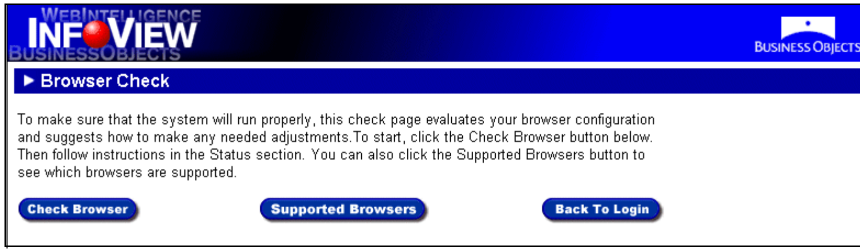
1. Start your Internet browser.
2. Point your browser to InfoView using either the bookmark or the URL your InfoView system administrator has given you.

   The InfoView login page opens.



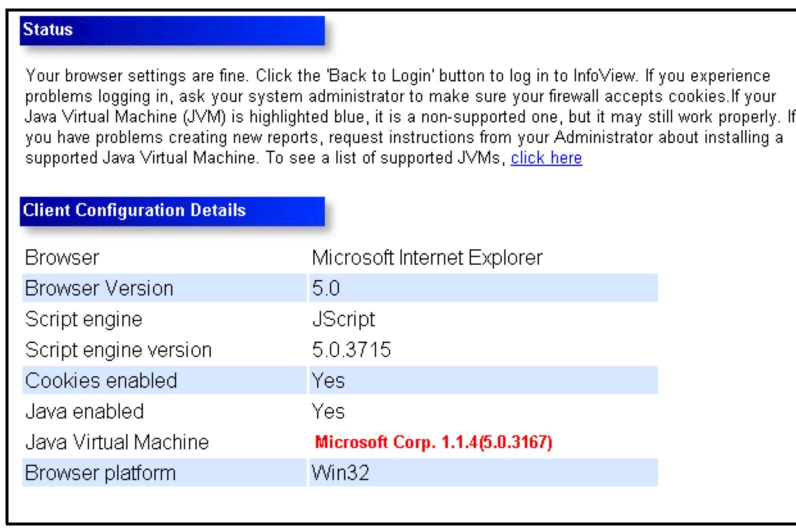
If your login page doesn't look like the image above, don't worry. Your system administrator may have customized it for use in your company or organization.

1. Click Check Browser. The Browser Check page opens.



2. Click Check Browser.

After a few seconds, INFOVIEW displays information about the browser you're currently using in the lower part of the page.



If you can't see all this information, use the scrollbar to scroll downward.

In this page's fields, fatal problems are displayed in bold and in red. Warnings are highlighted in bright blue.

Note: If your browser isn't JavaScript-enabled, it cannot run the Check Browser feature, and an error message appears.
If your Java Virtual Machine (JVM) was highlighted in blue when you performed the Browser Check, then the JVM you are using is a non-supported one. INFOVIEW may still work properly, but if you encounter any problems when creating documents in WEBINTELLIGENCE, you may need to install a new JVM. Click Supported Browser for a list of supported browsers and instructions on where to find them.

3. For a suggested solution to any problem or warning, simply click on the text.
4. For a list of supported browsers, click Supported Browsers.
5. Click the Back to Login button to return to the INFOVIEW login page.

Logging Into InfoView

To log into INFOVIEW, you need the following from your INFOVIEW system administrator:

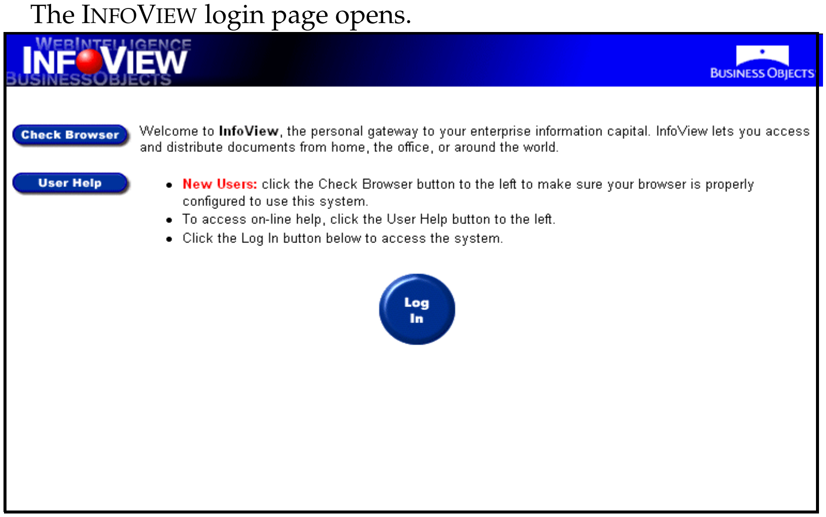
- Your user name and password
  If you're already a BUSINESSOBJECTS user, you can use your BUSINESSOBJECTS user ID and password to enter INFOVIEW.
- The URL or a bookmark which allows you to access INFOVIEW

Note: Depending on how your system administrator has set up your account, the pages giving you access to INFOVIEW may not resemble the pages displayed below. You may not even be prompted for a username and password.
If you need help launching INFOVIEW, contact your administrator.

To log in:

1. Start your Internet browser.
2. Point your browser to INFOVIEW using either the bookmark or the URL your system administrator has given you.

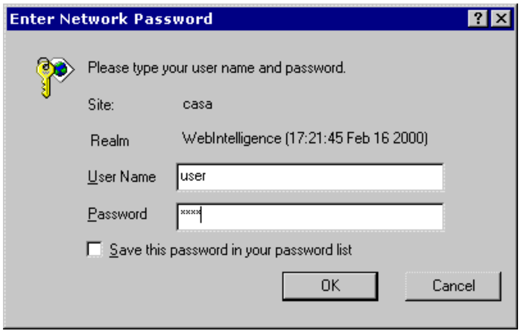
   The INFOVIEW login page opens.



If your login page doesn't look like the image above, don't worry. Your system administrator may have customized it for use in your company or organization.

1. Click the round Log In button.

   The Login dialog box appears.



2. Enter your user name and password in the entry boxes, then click OK.

   Your INFOVIEW start page loads up and you can begin working in INFOVIEW.

Your InfoView Start Page

The INFOVIEW start page is the first page that opens when you start INFOVIEW and is your main interface for viewing, managing and distributing all of the documents in your corporate database, including WEBINTELLIGENCE and BUSINESSOBJECTS documents.

The first time you start INFOVIEW, the Welcome page or the default page created by the supervisor opens. The Welcome page contains short descriptions of INFOVIEW and WEBINTELLIGENCE features and provides links that let you access them immediately.

Welcome link in the navigation bar

You can define a different start page, however, simply by selecting it from the list in the Options page. For example, you can customize the start page to display up to four panels of information at once. See page 50 for more information on setting your Default Start Page.

You can get back to the start page at any point by clicking Welcome or My InfoView in the navigation bar.

What InfoView Pages Look Like

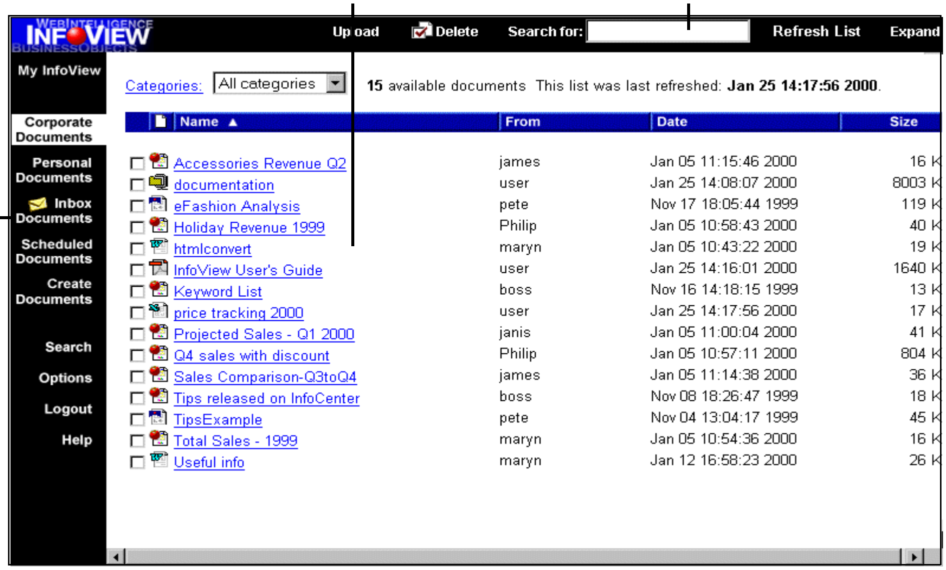
INFOVIEW pages have three parts:

- The page contents
- The topbar
- The navigation bar

The page contents

The **page contents** occupy the largest frame in the browser window, and are the part which most visibly changes as you navigate from page to page.

Page Contents
Top Bar
Navigation Bar



INFOVIEW document lists, and all the interfaces which permit you to view and act on documents are displayed in this part of the browser window.

The topbar

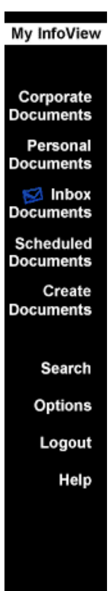
The **topbar** running across the top of the page changes according to the page's contents:

- If the page's contents include a document list, the topbar is a contextual toolbar containing links which allow you to upload documents, delete them, search for them, or refresh the document list.

- If a document is open, the topbar contains links allowing you to act on the open document.

- Otherwise, the topbar can simply be a graphical header.

The navigation bar



The *navigation bar* on the left side of the InfoView page remains constant no matter what page you open. The links it contains are determined by your user profile which is set by your system administrator.

Tip: You can customize the navigation bar by inserting a picture at the top of it. For instructions on how to do this, see page 48.

Depending on the access rights you've been accorded by the BusinessObjects supervisor, the navigation bar lets you access up to three different document catalogs:

- The Corporate Documents page
- The Personal Documents page
- The Inbox Documents page

Depending on your user rights, Create Documents may appear in the navigation bar. This option allows you to create documents in WEBINTELLIGENCE and/or BUSINESSOBJECTS. Refer to "Selecting the type of documents you want to create" on page 57 for information about setting the options for creating documents. The navigation bar also gives you access to other INFOVIEW pages:

- The Welcome Page or My InfoView Page
- The Search page
- The Options page
- The Help page

Note: For information about creating documents with WEBINTELLIGENCE, see the printed *WebIntelligence User's Guide* or the WEBINTELLIGENCE On-line User's Help. For information about creating a BUSINESSOBJECTS report, refer to the *BusinessObjects User's Guide*.

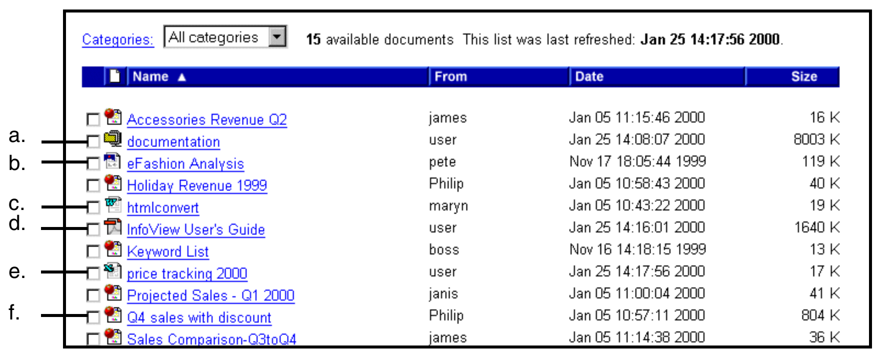
Accessing Documents

You can access existing documents from document lists in the Corporate Documents Page, Personal Documents Page, and/or Inbox Documents Page.

- To open any of these pages, just click its name in the navigation bar.

You can always access the Personal Documents and Inbox Documents pages. To access the Corporate Documents page, however, you must have the right to read at least one corporate document. You have been granted these and all other rights by your BUSINESSOBJECTS supervisor.

Document lists can include WEBINTELLIGENCE and BUSINESSOBJECTS documents, as well as any other documents that have been uploaded to the system. You can recognize each type of document by the icon preceding the document in the list. Some examples of document types are:



a. Zip file
b. BusinessObjects document
c. Microsoft Word document
d. Adobe Acrobat PDF file
e. Microsoft Excel spreadsheet
f. WebIntelligence document

These icons also let you perform the following operations on their corresponding document:

- Click on an icon to view the document's attributes.
- Right-click an icon to open a contextual menu which provides you with a variety of Web-related actions on the document.
- To view a document, just click its name in the document list.

Note: For more information about document lists, see “Compact or expanded document list display” in the next section, “Filtering document lists” on page 43, and “Using the Quick Search facility” on page 43.

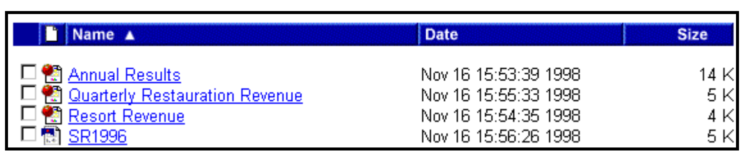
Compact or expanded document list display

You can display document lists in either Compact or Expanded mode by clicking Compact or Expanded in the toolbar.

The default setting is Compact, which lets you see more document entries without having to scroll. However, you can change the default setting for each document list page in the Options page.

Compact mode

In Compact mode, each entry consists of a single line:



Name ▲	Date	Size
Annual Results	Nov 16 15:53:39 1998	14 K
Quarterly Restauration Revenue	Nov 16 15:55:33 1998	5 K
Resort Revenue	Nov 16 15:54:35 1998	4 K
SR1996	Nov 16 15:56:26 1998	5 K

It includes:

- The document name
- The name of the document publisher (for corporate documents)
- The date the document was last published or updated
- The file size

Setting the sorting order in document lists

Use the bar at the top of the document list to set the order in which documents are displayed.

Click the attribute you want to use as the sorting criterion, for example, name. The first time you click an attribute, a white triangle pointing upward appears next to the attribute, for ascending order.

If you click the same attribute again, the triangle points down, and the documents are displayed in descending order.

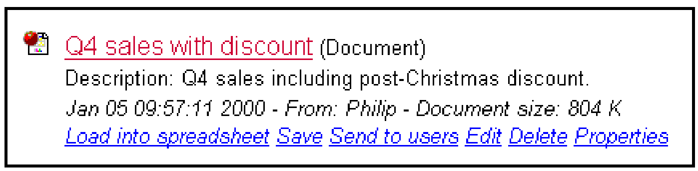
Deleting multiple documents

When you have the right to delete a document, a small box is displayed at the left of its entry.

- To delete one or more documents, check this box for each document you want to delete, then click Delete in the toolbar. For complete information, see “Deleting Documents” on page 118.

Expanded mode

In Expanded mode, each document entry contains four lines:



Line no....	Contains...
1	The document’s name. If it’s a corporate document, the document domain in which the document is stored is displayed in parentheses.
2	The document’s description, if it has been given one.
3	The time and date the document was last modified, the document’s author (corporate documents only), and its size.
4	A series of links which let you perform actions on the document without having to open it. These can include: • Load its data into a .csv or other spreadsheet file such as Microsoft Excel (for WebIntelligence documents) • Download it to a BusinessObjects .rep file (for BusinessObjects documents) • Save it as a personal document • Send it to another InfoView, WebIntelligence or BusinessObjects user • Edit the data in the document (depending on your user rights) • Delete it • View the document’s properties

Filtering document lists

Over time, the document lists in your Corporate and Personal Documents pages can include so many documents that the lists are no longer manageable--even in Compact mode.

Documents can be assigned to filtering mechanisms called categories. You can filter the documents in a list to display a more selective subset of documents by selecting a category from the Categories drop-down list at the top of the Corporate or Personal Documents page. INFOVIEW instantly filters the list to display the documents in the selected category only.

For example, when you select Marketing in the Categories list box, only documents that were assigned to the Marketing category when they were published are listed. This makes the list of documents shorter, more manageable and more pertinent.

By default, the attribute All Categories is selected. This means that the entire list is displayed.

If you have the appropriate rights, the word Categories is blue and underlined, indicating a hypertext link. If you click on this link, the Category Management page is displayed, where you can create, update and delete categories.

For complete information about categories, see “Using Document Categories” on page 97.

Using the Quick Search facility

If you’re having trouble finding a document on a page, you can use the Search for feature in the INFOVIEW toolbar to search for that document.

To do a quick search:

1. Enter part or all of the document name in the entry box.
2. Press Enter.

   The list of documents corresponding to your search criterion is displayed.

To return to your original document list, click the Back button in your browser.

INFOVIEW also provides you with a more sophisticated search tool on the Search page. See also “Searching for Documents” on page 71 for information on more powerful document searches.

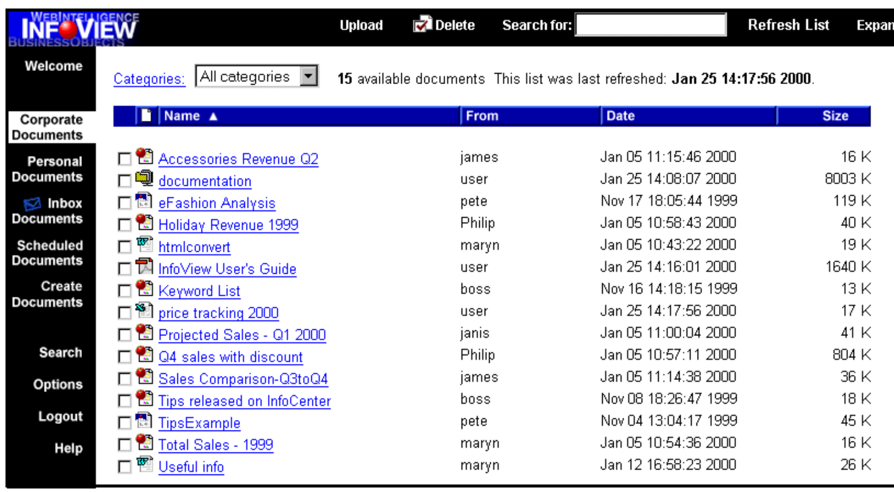
Tip: If you find yourself using the Quick Search facility often, it may be time to start assigning your documents to categories so that you can filter your document lists.

Note: You can also search for documents by extension, for example, .doc or .txt. This type of search is only available for non-BusinessObjects documents.

The Corporate Documents Page

Corporate documents are documents that have been saved to a document domain in the corporate repository and made accessible to workgroups within your corporation or organization.

To access the list of corporate documents you're allowed to read, click Corporate Documents in the navigation bar.



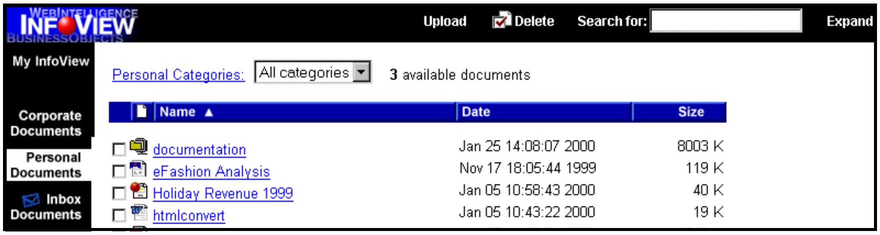
By default, all the documents for which you have read rights are displayed. These rights, as well as the actions you can take on these documents, are determined by the BusinessObjects supervisor.

If this document list becomes overly long and unwieldy, you can make it easier to manage and understand if you display only a subset of all these documents. See "Filtering document lists" on page 43.

The Personal Documents Page

Personal documents are documents you have saved for your personal use. They can be documents you have created, corporate documents of which you have saved a personal copy, or documents sent to you by other users that you've saved.

To access the list of your personal documents, click Personal Documents in the navigation bar.



By default, all the documents in your Personal Document storage area are displayed. If there are too many documents, however, you can make this list easier to manage and understand if you display only a subset of the documents. See "Filtering document lists" on page 43.

The Inbox Documents Page

Your Inbox Documents page contains documents that other people have created and mailed to you.

If you have documents waiting in your Inbox Documents page when you log in, the envelope outline next to the Inbox Documents link in the navigation bar changes to a yellow envelope.

Your inbox contains no new documents.	**Someone has sent you a document that you haven't yet read.**
	

To access the list of documents in your inbox, click the Inbox Documents link.

Documents that you have not read are flagged with envelope icons (see image above).

The envelope does not change to indicate that you have received a new document in your Inbox while you are logged in. To see any documents that you receive while you are logged in, you must refresh the Inbox Documents list.

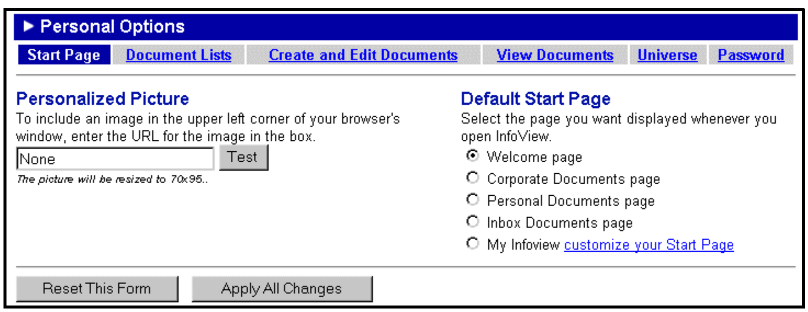
Tip: INFOVIEW does not automatically clear your inbox of documents you've read. To prevent this page from becoming cluttered you should immediately delete the documents that you are done with.
Act on the remaining documents as soon as possible, by downloading, saving, publishing, or sending them, then delete them from the inbox.

Customizing InfoView

InfoView allows you to customize your account so that it is tailored to your needs.

The Options page has six sections containing settings that allow you determine what types of documents you create, how you view documents, and the appearance of your InfoView account. The options available to you depend on the user rights given to you by the supervisor.

The Options page looks like this:



- Start Page

  Lets you specify your InfoView start page and insert a picture at the top of the navigation bar.
- Document Lists lets you:
  - Set whether document lists are displayed in Compact or Expanded format.
  - Specify a document category to be used as default filtering criterion.
  - Specify when to refresh the list (Corporate and Inbox Documents lists only).
- Create and Edit Documents

  Lets you choose what type of documents you want to create, WebIntelligence or BusinessObjects, and what form of the Web Panel you use to create and edit WebIntelligence documents.
- View Documents

  Lets you specify in which format you view BusinessObjects documents.

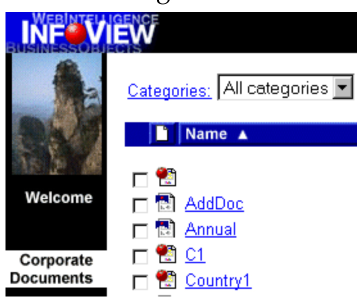
- Universe

  Lets you specify how you view the list of available universes and how often the list is refreshed.
- Password

  Lets you change your INFOVIEW/WEBINTELLIGENCE/BUSINESSOBJECTS password.

Setting a picture

You can configure INFOVIEW to display a picture at the top of the navigation bar.



This picture should be a .gif, .jpg or .jpeg image 70 pixels wide by 95 pixels high. If it isn't, the browser forces the picture to those dimensions, resulting in a distorted picture.

You can put your picture on an available HTTP server then use that server's URL. In some cases it might be easier to have the picture file on your own computer. The URL could appear in one of the following formats:

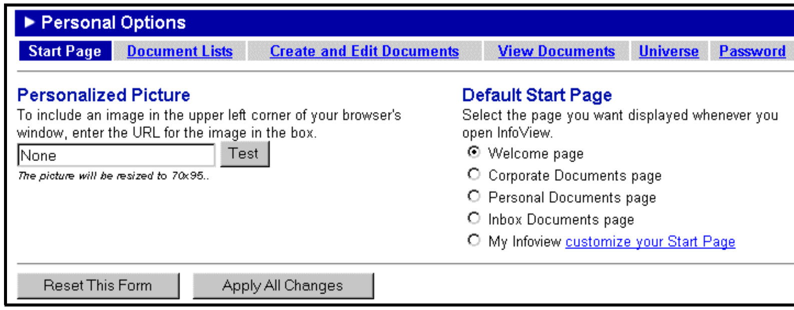
- file://<Drive Name>/<FilePathAndName>
- http://<Server Name>/<FilePathAndName>

For example, a valid URL might be file://C:/Windows/Myself.gif

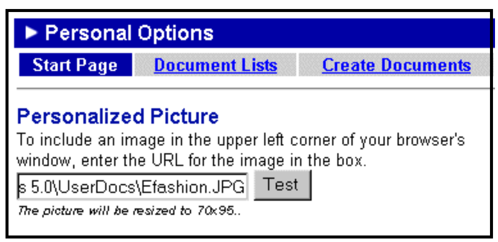
To define the picture to be displayed in your INFOVIEW:

1. Click Options in the navigation bar.

The Options page opens.



2. In the Start Page options, type your picture's URL in the Personalized Picture/ URL Location box.



3. Click the Test button.

   This makes sure that the picture is at a valid URL that can be reached by your browser and INFOVIEW.

4. Your browser displays the picture at the top of the navigation bar. Click the Apply All Changes to save your changes.

Setting your Start Page

Once you have logged in to INFOVIEW, your start page opens automatically. By default, this is the Welcome page.

You can set the default start page to display the Welcome, Corporate Documents, Personal Documents, Inbox Documents page, or My InfoView.

To specify your default start page:

1. Click Options in the navigation bar.

   The Options page is displayed.

2. In the Default Start Page section of the Start Page options, select the page you want to be your start page.

3. Click Apply All Changes to save your changes.

Note: If you selected My Infoview as your start page, refer to “Configuring My InfoView” on page 51 for information on how to set up My InfoView.

The next time you launch INFOVIEW, it will automatically open to the selected page.

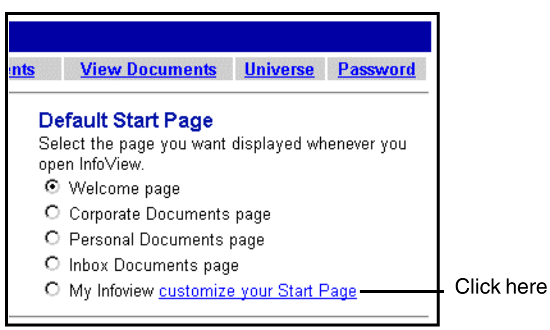
Configuring My InfoView

The My InfoView start page allows you to divide your browser window into several panes. This allows you to view important information from different sources at the same time in your browser window. You can display up to four panes at once, each pane containing one of the following:

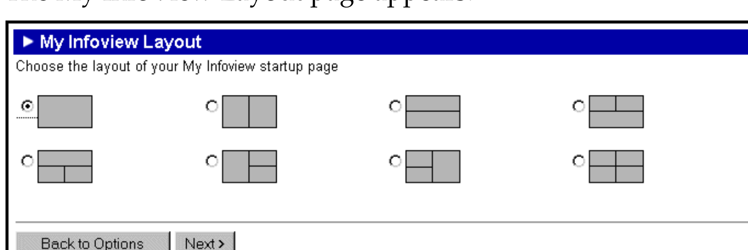
- Inbox Documents list
- Corporate Documents list
- Corporate document
- Personal Documents list
- Personal document
- Web page

To configure your My InfoView:

1. Click Options in the navigation bar.
2. In the Default Start Page section of the Start Page options, select My InfoView to be your start page.
3. Click *Customize your Start Page*.

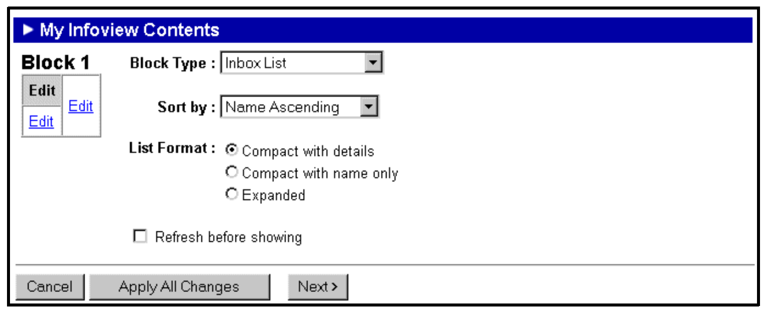


The My InfoView Layout page appears.



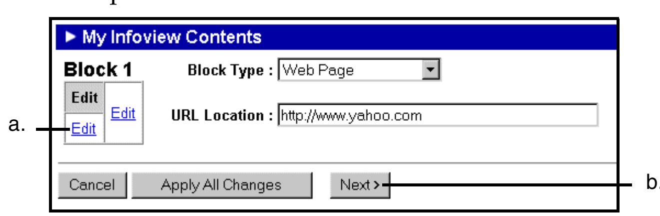
4. Select the number of panes you want to display.
5. Click Next.

   The Block 1 options appear. This is where to set what you want to appear in the first pane.



6. Select the options you want to apply.

   For descriptions of Block Types and options, see “Block Type Options” on page 52.
7. Click Next to proceed to the next pane, or click one of the Edit links to edit another pane.



a. Click here to edit a particular pane.
b. Click here to edit the next pane.

8. When you have configured each pane, select Apply All Changes.

Block Type Options

When you are configuring My InfoView, you can choose from among the following options:

- Inbox List - displays the documents you have received from other users in your Inbox
- Corporate List - displays the documents in the Corporate Documents
- Corporate Document - displays a particular document from the Corporate

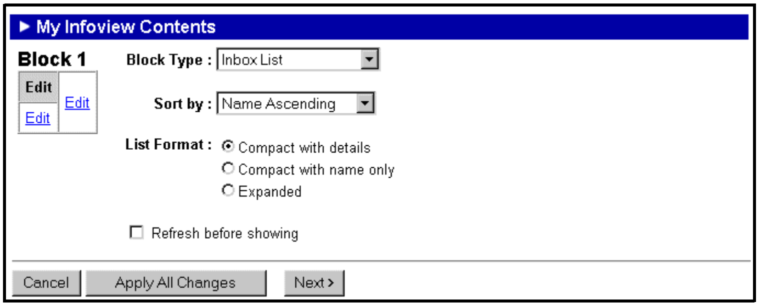
Documents list

- Personal List - displays the documents you have saved to your Personal Documents list
- Personal Document - displays a particular document from your Personal Documents list
- Web Page - displays a web page

Each of these block types has different options you can set:

Inbox List

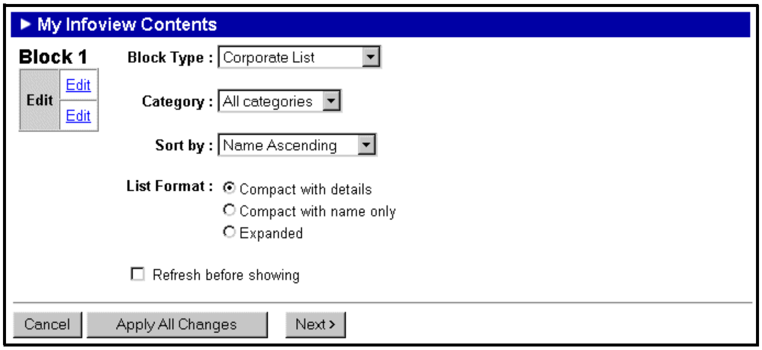
The Inbox List block type allows you to display the Inbox Documents list in a pane:



- Sort by - choose the order the documents appear in the list
- List Format - choose how the documents are displayed
- Refresh before showing - refreshes the document list each time you view My InfoView

Corporate List

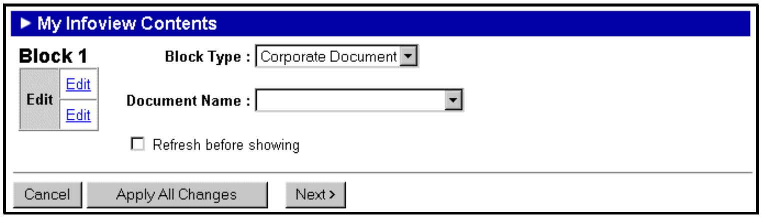
The Corporate list block type allows you to display the Corporate Documents list in a pane:



- Sort by - choose the order the documents appear in the list
- Category - choose the corporate category you want to display
- List Format - choose how the documents are displayed
- Refresh before showing - refreshes the document list each time you view My InfoView

Corporate Document

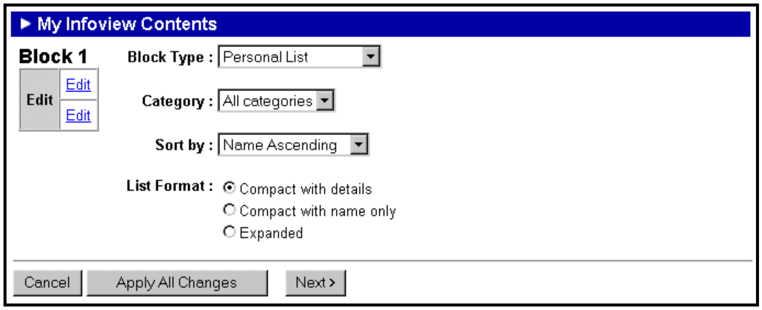
The Corporate Document block type allows you to display a document from the Corporate Documents list in a pane.



- Document Name - enter the name of the document you want to display
- Refresh before showing - refresh the document each time it is displayed

Personal List

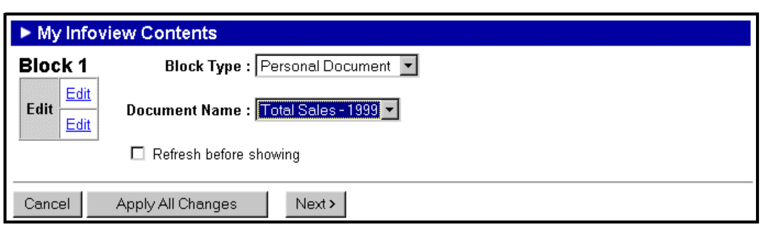
The Personal List block type allows you to display the Personal Documents list in a pane:



- Sort by - choose the order the documents appear in the list
- Category - choose the corporate category you want to display
- List Format - choose how the documents are displayed
- Refresh before showing - refreshes the document list each time you view My InfoView

Personal Document

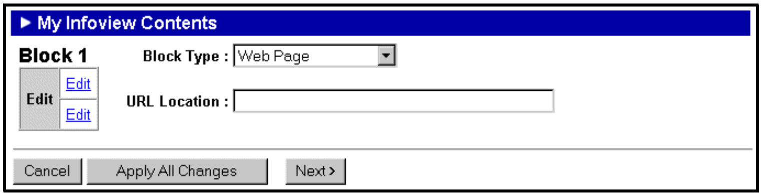
The Personal Document block type allows you to display a document from the Personal Documents list in a pane.



- Document Name - enter the name of the document you want to display
- Refresh before showing - refreshes the document each time it is displayed

Web Page

The Web Page block type allows you to display any web page. Simply enter the URL in the URL Location text box.



Note: For detailed descriptions of each List Format, see "Compact or expanded document list display" on page 41.

Changing the document list display

The Corporate, Personal, and Inbox Documents page document lists can be displayed in Compact or Expanded form. The biggest difference is that Compact mode lets you see more document names at a glance, but the Expanded version includes documents' descriptions if they have them, as well as links that let you perform actions on documents directly from the list.

By default, the Personal Documents list is refreshed automatically each time you visit that page. For the Corporate and Inbox Documents pages, however, you can decide when the document list is refreshed.

You can also specify a document category to be used as default filtering criterion in the Corporate and Personal Documents pages.

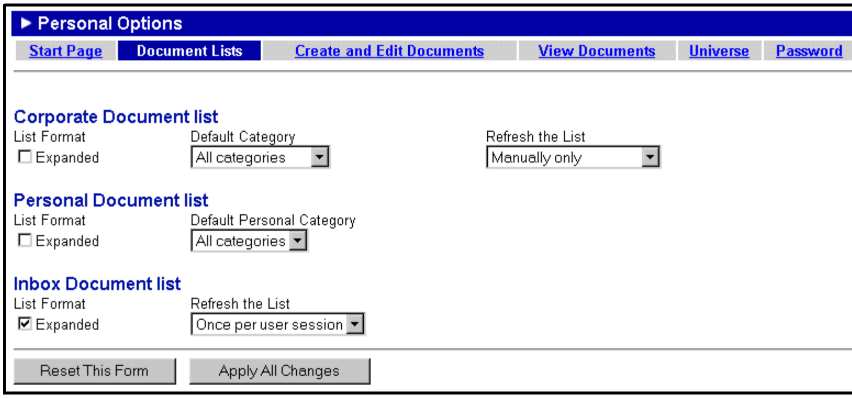
To determine document list display:

1. Click Options in the navigation bar.

   The Options page is displayed.

2. Click the Document Lists link.

The Document List options page opens. By default all lists appear in Compact format.



3. To view the Corporate, Personal or Inbox Documents list in Expanded format, check Expanded under the corresponding list.
4. For the Corporate and Personal Documents pages, you can select a category to serve as the default filtering criterion for each page. This means that when you open each of these pages, only the documents in the specified category will be displayed in the document list.
   By default, All categories, or the category set by the supervisor for your user profile, is selected.
5. For the Corporate and Inbox Documents page, select a refresh option.
6. When you are finished, click Apply All Changes.

Selecting the type of documents you want to create

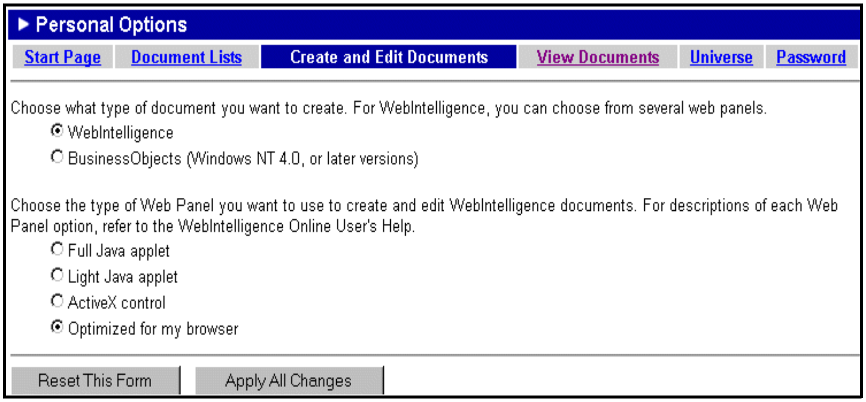
Depending on your user rights, you may have the option to create and edit documents in WEBINTELLIGENCE or BUSINESSOBJECTS. If you choose to create documents in WEBINTELLIGENCE you can choose from several Web Panels.

To create WebIntelligence documents

1. Click Options in the Navigation bar.

   The Options page opens.

2. Click the Create and Edit Documents link.



3. Select WebIntelligence from the options for the type of document you want to create.

4. Select the Web Panel you want to use to create WebIntelligence documents.
   - Full Java applet
   - Light Java applet
   - ActiveX control
   - Optimized for browser

5. When you are done, click the Apply All Changes button.

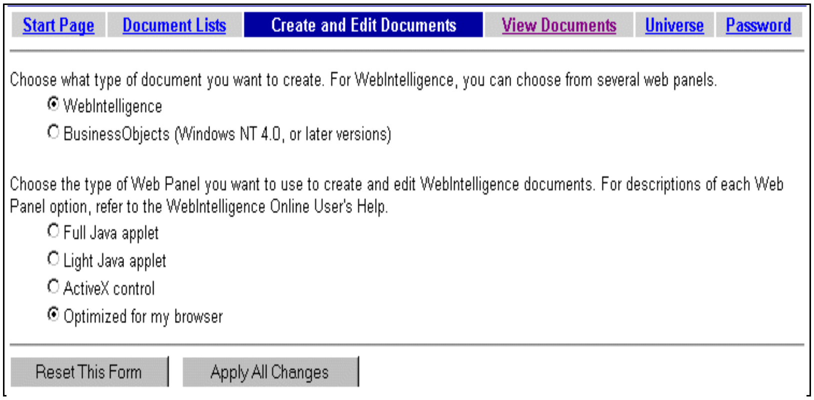
Note: For information about creating and editing WebIntelligence documents, or a complete description of Web Panel options, refer to the *WebIntelligence User's Guide* or WEBINTELLIGENCE On-line Help.

To create BusinessObjects documents

1. Click Options in the Navigation bar.

   The Options page is displayed.

2. Click the Create and Edit Documents link.



3. Select BusinessObjects from the options for the type of document you want to create.

4. When you are done, click the Apply All Changes button.

Note: The first time you view a document with BUSINESSOBJECTS, you must follow a short installation procedure. For instructions on installing BUSINESSOBJECTS, refer to "Viewing BusinessObjects documents in InfoView" on page 74. For information about creating and editing documents in BUSINESSOBJECTS, refer to the *BusinessObjects User's Guide*.

Selecting how you want to view BusinessObjects documents

You can specify whether you want to view BUSINESSOBJECTS documents with WEBINTELLIGENCE or with BUSINESSOBJECTS. If you do not have the right to view BUSINESSOBJECTS documents in BUSINESSOBJECTS, the option is greyed.

If you choose to view BUSINESSOBJECTS documents with WEBINTELLIGENCE, you may choose how the document appears in your browser by selecting one of the following viewing formats.

- Standard HTML format

- Enhanced document format (*also known as ActiveX viewer*)
  - Lets you view BUSINESSOBJECTS documents exactly as they appear in the BUSINESSOBJECTS product. For example, you can navigate through the document by sections and zoom into the document.
  - Unlike HTML format, allows WYSIWYG (What You See Is What You Get) printing.
- PDF Acrobat Reader
  Allows you to view documents using Adobe Acrobat Reader. You must have Adobe Acrobat Reader installed on your machine to view files in this format.
- Optimized for my browser
  This selection uses the viewing format best suited for your browser. Enhanced document format for Internet Explorer and Standard HTML for Netscape.

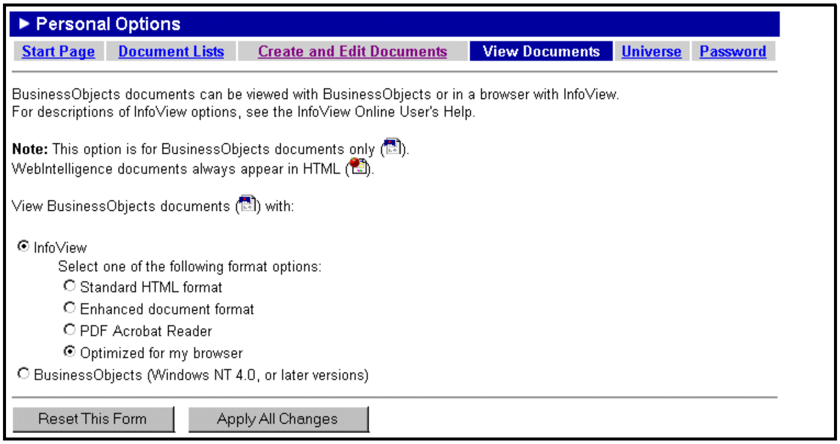
Note: If you choose to view documents in Enhanced document format with a Netscape browser, you must install a plugin. If you do not have the plugin, you will be prompted to install it the first time you attempt to open a document.
For more detailed information about the different viewing options, see "Viewing Documents" on page 73.

To select a format for viewing BusinessObjects documents:

1. Click Options in the navigation bar.

   The Options page is displayed.

2. Click the View Documents link.



3. Select how you want to view BusinessObjects documents:
    - InfoView
    - BusinessObjects

4. If you choose to view BusinessObjects documents with InfoView, you may select on the following viewing formats:
    - Standard HTML format
    - Enhanced document format
    - PDF Acrobat Reader
    - Optimized for browser

5. When you are done, click Apply All Changes.

Note: If you select to view BusinessObjects documents in BusinessObjects, you must initially follow a short installation procedure. For instructions on installing BusinessObjects through the InfoView portal, refer to “Viewing BusinessObjects documents in BusinessObjects” on page 81.

Changing your password

Your initial InfoView password is created by the BusinessObjects supervisor who defined your user profile. Once you have logged into InfoView for the first time, however, you can change your password to one of your choice if you have the user right to do so.

When you change your password, it changes for BusinessObjects as well.

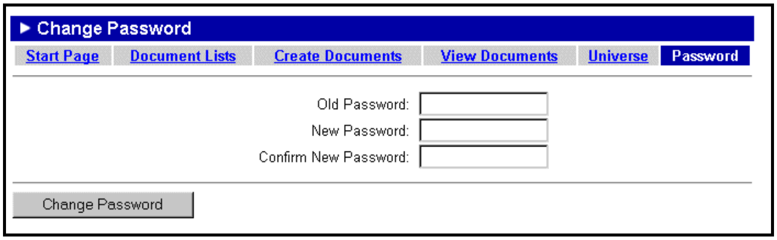
To change your password:

1. Click Options in the navigation bar.

   The Options page opens.

2. Click the Password link.

   The Password page appears.



3. In the Change Password section:
   - Type your current password in the Old Password box.
   - Type your new password in the New Password box. This is case-sensitive.
   - Confirm the new password by typing it again in the Confirm New Password box.

4. Click the Change Password button.

The next time you log in to InfoView, you will need to use the new password.

Switching to a different language

InfoView is available in different languages. The languages that you can work with depend on the licenses your company or organization purchased. The *Deployment Guide* provides a list of supported languages.

Only WebIntelligence administrators can change the language that you work in with InfoView. The *WebIntelligence System Administrator's Guide* provides information on how to do this.

Using a different language for enhanced document format

If you have been viewing BUSINESSOBJECTS documents in enhanced document format, you will have downloaded the document viewer from INFOVIEW to your desktop. So, even if your administrator has switched INFOVIEW to a different language, the language of the document viewer will remain, because it resides on your desktop, not on the server.

The only way to change the language of the viewer is to:

- Have your administrator switch to a different language on the server side
- Delete the file corresponding to the viewer that you are currently using
- View a document in the new language; doing so automatically downloads the viewer in the new language to your desktop from the server.

Here's the step-by-step procedure:

1. Have your administrator switch to a different language on the server side.
2. Open Windows Explorer, or equivalent on other operating systems.
3. Delete the appropriate file depending on the browser you use:

Using...	Search for then delete...
Internet Explorer	RptViewerAX.dll
Netscape	NPaxvnet.dll

4. Log in to INFOVIEW, which has been changed by your administrator.
5. In INFOVIEW, open a BUSINESSOBJECTS document.

Troubleshooting: what to do if you can't find RptViewerAX.dll

Internet Explorer users should delete the file named RptViewerAX.dll. If you can't find this file on your system, use your operating system to search for RptViewerAX Class.

When you locate RptViewerAX Class, delete it. If you are using Windows:

1. Search for the file, RptViewerAX Class, using Windows Explorer.
2. Right click RptViewerAX Class.
3. Select Delete from the pop-up menu that appears.

Getting Help

INFOVIEW provides you with two kinds of on-line help:

- The Interface Reference
- The On-line User Help

The Interface Reference

The Interface Reference is your guide to every page and dialog box in the INFOVIEW interface. As you use INFOVIEW, you can obtain contextual help for the interface element you are currently using simply by clicking Help in the navigation bar.

A new browser window opens, with a modified navigation bar and toolbar, and a description of the interface element you are using in the contents area of the page.

You will also find hypertext links to relevant sections in the On-line User Help.

From this page, you can:

- Jump to other topics in the Interface Reference by clicking their names in the navigation bar

- Access the on-line user documentation by clicking On-line User's Help in the toolbar

  When the User's Help is open, the navigation bar changes to display links to its major topics.

To return to INFOVIEW, either close the browser containing the Help window, or give the focus to the browser window running INFOVIEW.

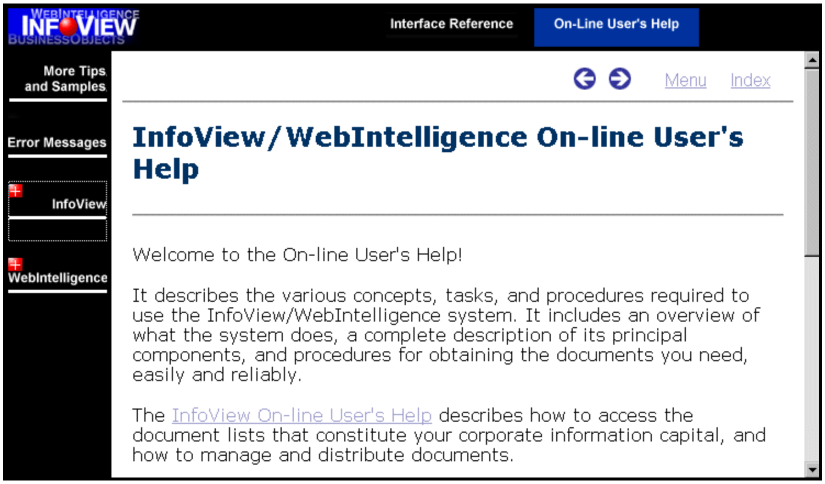
The On-line User Help

The INFOVIEW On-line User Help provides you with a detailed description of both INFOVIEW and the concepts behind it, as well as complete instructions for using the product, every step of the way. You can also open a PDF version of the *InfoView User's Guide* as well as other related documentation.

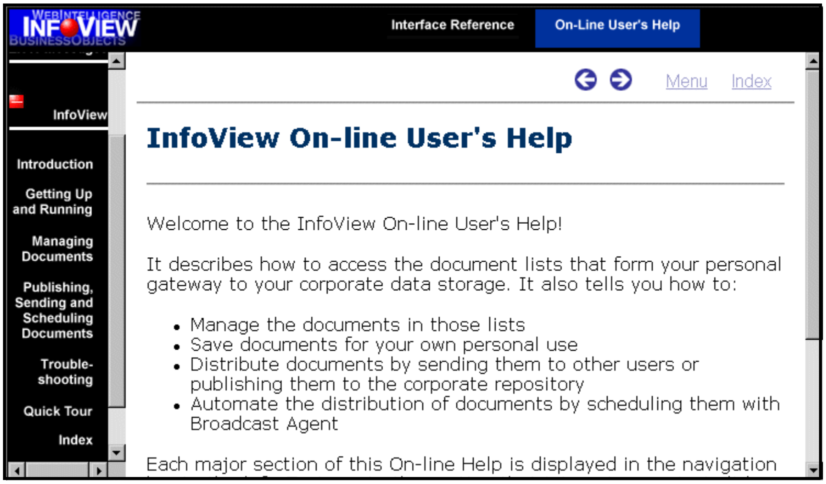
To access the INFOVIEW On-line User's Help:

1. Do one of the following:
   - From the InfoView login page, click the User Help link (either the text or the Help! image).
   - From the Welcome page, click the User Help link (either the text or the Help! image).
   - From the Interface Reference, click On-line User's Help in the toolbar.

   The InfoView/WebIntelligence On-line User's Help page is displayed.



Click either the InfoView link in the navigation bar to the left, or the InfoView On-line User's Help link in the page contents. The InfoView On-line User's Help overview opens.



This page provides overall information about the on-line documentation. You can also access a particular topic by clicking its name, under InfoView in the navigation bar to the left.

Tip: You can expand or collapse the INFOVIEW Help links in the navigation bar simply by clicking the underlined InfoView link again.
Notice that the navigation bar also contains links to the WEBINTELLIGENCE Help. To expand this section of the navigation bar and display an overview of the WEBINTELLIGENCE On-line User's Help, click the underlined WebIntelligence link.

The Multimedia Quick Tour

This multimedia presentation gives you a step-by-step tour of the basic functions of INFOVIEW to help you get started. To access it, click the Quick Tour link on the navigation bar. The Quick Tour appears in a separate browser window:

To return to INFOVIEW, either close the browser containing the Help window, or give the focus to the browser window running InfoView.

Logging Out Of InfoView

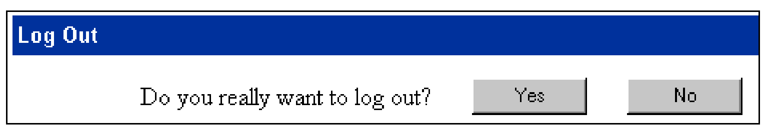
When you are done using InfoView, log out of the product instead of just closing your browser. This helps InfoView system administrators keep track of which users are logged into the system and active at any given time. This allows them to configure the system to handle transaction loads most efficiently.

Logging out is easy. If you're inactive longer than the maximum time period defined by your administrator, InfoView logs you out automatically. You can also actively log out at any time.

To log out of InfoView:

1. Click Logout in the Welcome Page, or click the Logout button on the navigation bar.

   The Logout page opens.



2. Click Yes.

If you decide you don't want to log out after all, do any of the following:

- Click No.
- Return to the previous HTML page you viewed by clicking the browser's Back or Previous button.
- Go to any other part of InfoView by clicking a link in the navigation bar.

Chapter 3 Managing Documents

In this chapter

Searching for Documents

INFOVIEW manages a large number of documents. To make it easy to find the document you need, you can search for documents based on the document's name, author name, keywords, and date of last modification using the Search page. You can even combine one, two, or all of these search criteria—document name, author name, and date modified—to search through a narrower array of documents.

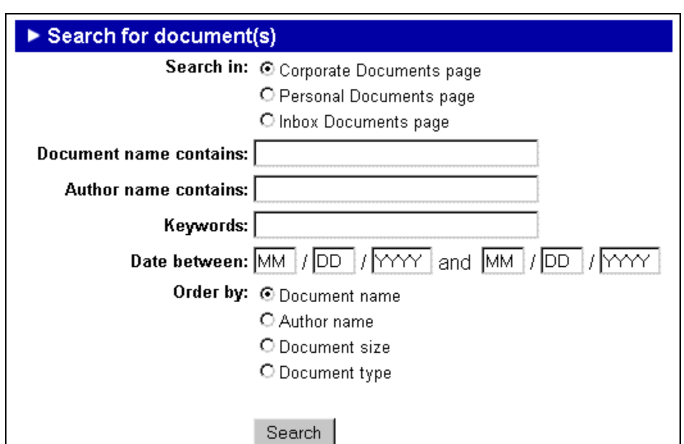
The only thing you cannot combine is storage areas. That is, you cannot search through the corporate documents in the repository and your personal documents stored on the INFOVIEW server at the same time.

Note: If you remember at least part of the document's name, as well as the document list it belongs to, it's probably quicker to do a Quick Search. See page 43.

To search for one or more documents:

1. Click Search in the navigation bar.

   The search page is displayed.



2. Select which area you want to search: Corporate Documents, Personal Documents, or Inbox Documents.

3. If you want to search by document name, enter some part or all of the name you want to search for in the Document name contains box.

   You don't have to enter the entire document name. For example, if you want to search for a document entitled "Revenue by quarter and sales district," just enter the word "Revenue." If you use too common a word, the search may take a long time, or return too many document names to be useful.

4. If you want to search by document author, enter some or all of the name you want to search for in the Author name contains box.

   You can launch a search either by entering the author's entire name, or a partial name. Again, avoid using common names to prevent time-consuming searches and long document lists.

5. If you want to search by keyword, you can enter keywords that may be associated with the document that you are looking for. Note: The search by keyword is a character search. It returns all documents related to the letters you entered.

6. You can also specify a range of dates within which the document was last modified by entering the starting and ending dates in the boxes (Month/Day/Year). Only documents that were last modified on or between those two dates are returned as a result of the search.

   Note that the creation, first publication, or first saved dates are not taken into account in this search. The only date that is matched is the date the document was last saved to the selected storage area.

7. In the Order by area, select the criterion you want to use for sorting the search results.

8. Click the Search button to begin the search.

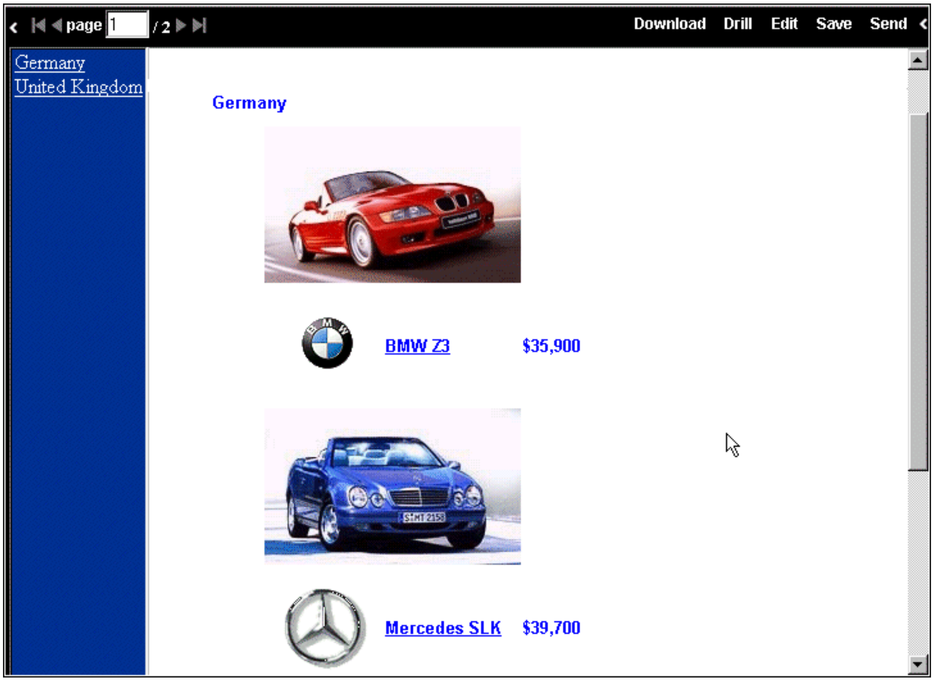
Once the search engine returns a list of matching documents, you can view any of them by clicking the document's name in the list.

Note: You can also search for documents by extension, for example, .doc or .txt. This type of search is only available for non-BUSINESSOBJECTS documents.

Viewing Documents

To view an existing WEBINTELLIGENCE or BUSINESSOBJECTS document, or any document uploaded from another source, just click its name in any INFOVIEW document list.

The document appears in the Document Results page in your browser.



If the document you want to open was created in WEBINTELLIGENCE or BUSINESSOBJECTS, it may contain a *user prompt*, however, a dialog box appears instead, prompting you for information. Refer to "Viewing or Refreshing Documents with Prompts" on page 91 for more detailed information.

The document above is an example of a WEBINTELLIGENCE document. All WEBINTELLIGENCE documents are in HTML format.

You can choose to view BUSINESSOBJECTS documents, however, in either BUSINESSOBJECTS or WEBINTELLIGENCE, depending on your user rights.

Note: When you view a BUSINESSOBJECTS document in WEBINTELLIGENCE, you can choose to view it in standard HTML format, or in enhanced document format. All of the viewing formats are compatible with the new Euro currency format, but to be able to use this feature, you must be using a recent version of windows or an older version equipped with the appropriate patch.

If you encounter problems viewing or editing reports that contain Object Linking and Embedding (OLE 2) objects. This may be because the report has been shared via Enterprise Server products installed on UNIX or your current session has been opened from Enterprise Server products installed on UNIX. You should contact your WEBINTELLIGENCE or BROADCAST AGENT administrator.

To insert a logo or other image in a report and share the report via Enterprise Server products installed on UNIX, you should save the image as a bitmap (.bmp). You can do this in Microsoft Paint or a similar application.

Viewing BusinessObjects documents in InfoView

You can view BUSINESSOBJECTS documents either as standard HTML documents, in Acrobat PDF format, or in a special enhanced document format. You indicate which format you want to use in the Options page (see “Selecting how you want to view BusinessObjects documents” on page 59).

There is a substantial difference in how the same document looks -- and prints -- depending on the option you choose:

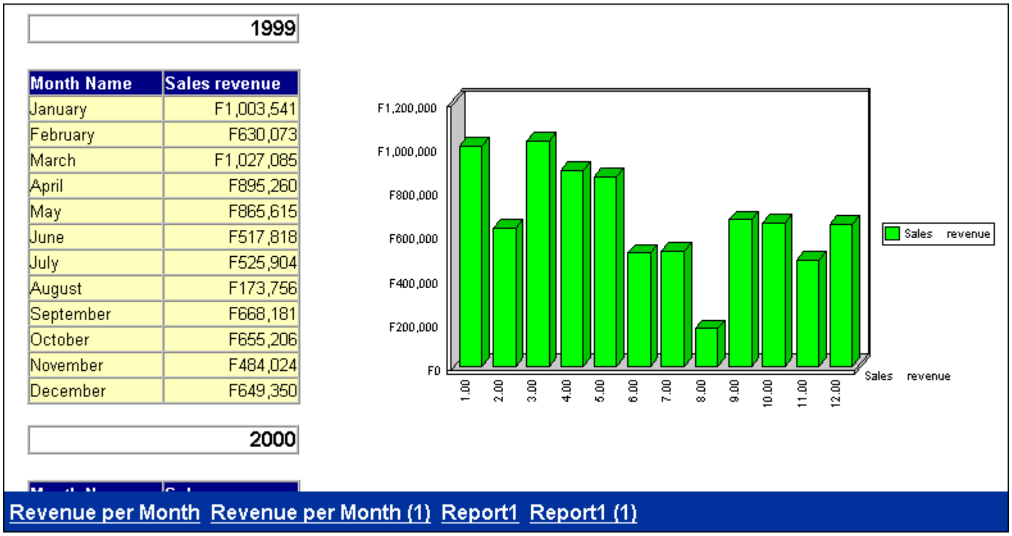
- “Viewing BusinessObjects documents in HTML format” on page 75
- “Viewing BusinessObjects documents in enhanced format” on page 76
- “Viewing BusinessObjects documents in PDF Acrobat Reader” on page 78

Once the document is open in the Document Results page, you can perform a slightly different set of actions on the document than on a WEBINTELLIGENCE document. See page 79.

Note: If a BUSINESSOBJECTS document has a macro attached which makes calls to external files or applications, you must have these installed on your machine. Likewise, if you have installed a BUSINESSOBJECTS add-in, you must have any files which the add-in calls installed. If external files such as these are not installed locally, then you may not be able to refresh certain documents. For more information on working with macros and add-ins, see the *BusinessObjects SDK Reference Guide*

Viewing BusinessObjects documents in HTML format

When you open a BUSINESSOBJECTS document in standard HTML format, the BUSINESSOBJECTS tabs are converted into hyperlink text, which appear at the bottom of the screen. You can click to view individual reports within the file.

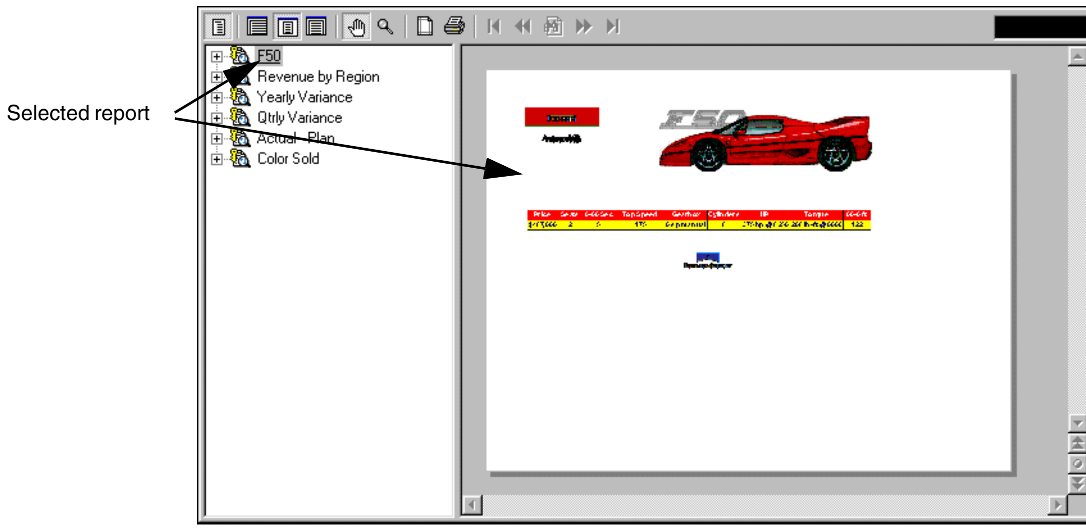


You can view documents easily and rapidly in HTML format, however, HTML has various printing restrictions -- which means that when you print the document, you may find certain document elements missing from the printout.

Note: With WEBINTELLIGENCE and INFOVIEW you cannot launch the same session in multiple browser windows. To open several windows simutaneously run a second browser and re-login.

Viewing BusinessObjects documents in enhanced format

When you open a document in enhanced format, it looks as if it has been opened in BUSINESSOBJECTS:

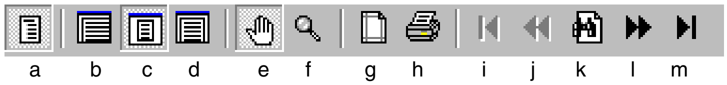


You see the same formatting as in BUSINESSOBJECTS, including page headers and footers which you don't see in HTML documents. And you can take advantage of BUSINESSOBJECTS navigation and zooming features.

Fonts that are unavailable with HTML are perfectly rendered in this format.

Enhanced format also brings you WYSIWYG (What You See Is What You Get) printing.

When you view documents in enhanced format, the viewer toolbar provides additional features for viewing, browsing and printing documents:



a. Show/Hide Sections Tree
Lets you show or hide the navigation window on the left of the document. This window lets you jump from section to section on the document.

b. Normal Size
Displays the document in the display window.

c. Fit to Window
Makes the document fit the display window

d. Fit Width to WIndow
Widens the document to the width of the window.

e. Panning
Lets you push the document up or down using a hand-shaped cursor.

f. Zooming
Lets you zoom in or out by clicking the document.

g. Page Setup
Lets you select margin size, paper size and document orientation.

h. Print
Lets you set print options and prints the document.

i. Beginning
Sends you to the first page of the document.

j. Previous
Displays the previous page of the document.

k. Go to Page
Lets you select the page you want to navigate.

l. Next
Displays the next page of the document.

m. End
Displays the last page of the document.

Viewing enhanced format documents using Netscape

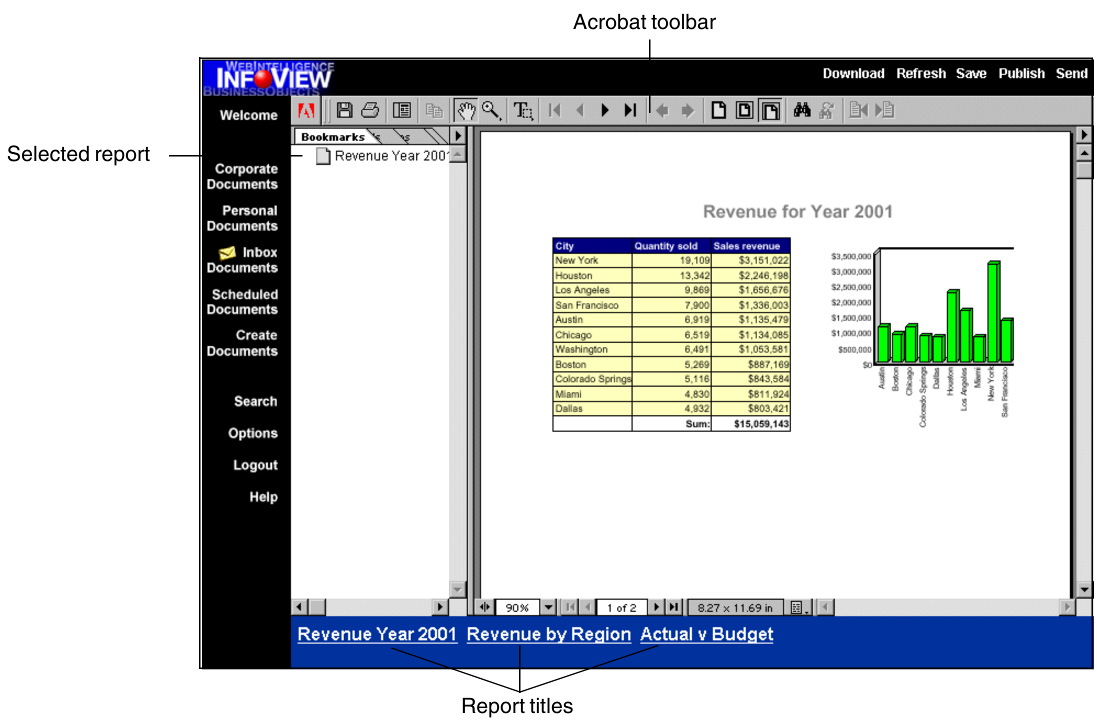
To view BUSINESSOBJECTS documents in enhanced format with a Netscape browser, you need to define BUSINESSOBJECTS as an external helper application. To do this:

1. Choose Options / General Preferences in Netscape Editor.
2. Define BusinessObjects as a helper application in the Helpers tab.

Viewing BusinessObjects documents in PDF Acrobat Reader

You must have Adobe Acrobat Reader installed on your machine in order to view PDF documents in the INFOVIEW window.

When you open a BUSINESSOBJECTS document in PDF Acrobat Reader format, Adobe Acrobat Reader automatically launches and appears in the page contents area of your INFOVIEW window.



To view another report, click on the report titles that appear below the document as hyperlinks. If the BUSINESSOBJECTS report contains multiple sections, they will appear below the report title in the Bookmarks pane.You can also print the PDF document without having to worry about whether or not you have the correct fonts installed on your machine.

When you view documents that contain OLE 2 objects in PDF format, you may encounter problems displaying the OLE 2 objects.

To insert a logo or other image in a report and save the report as a PDF document, you should save the image as a bitmap (.bmp). You can do this in Microsoft Paint or a similar application.

What you can do with BusinessObjects documents in InfoView

The following tables describe what you can and cannot do with BUSINESSOBJECTS documents using INFOVIEW:

Action	You can	You cannot
Refresh the document with the latest data	✓	
Publish the document to the Corporate Documents repository where others can access it	✓	
Download the document to a BUSINESSOBJECTS.rep file	✓	
Save the document as a personal document	✓	
Send the document to another user	✓	
Delete the document	✓	
View the document's attributes	✓	
Print the document	✓	

Action	You can	You cannot
Load the document’s data into a spreadsheet		✓
Turn the block of data into a chart or a different table		✓

Note: If your user rights allow you to view BUSINESSOBJECTS and WEBINTELLIGENCE documents in BUSINESSOBJECTS, the BusinessObjects option appears in the View Documents tab in your personal options page. For complete descriptions of these options, refer to “Selecting how you want to view BusinessObjects documents” on page 59.

Viewing BusinessObjects documents in BusinessObjects

If your user rights allow it, you may also view BUSINESSOBJECTS documents in BUSINESSOBJECTS. You indicate how you view BUSINESSOBJECTS on the View Documents tab of the Options page. For instructions on setting this option, see “Selecting how you want to view BusinessObjects documents” on page 59.

The first time you choose to view a document using BUSINESSOBJECTS, you will be prompted to install BUSINESSOBJECTS. Once it is installed, BUSINESSOBJECTS automatically launches each time you open a BUSINESSOBJECTS document. If you already have version 5.1 of BUSINESSOBJECTS installed from the CD on your machine, the document will open in that version, and the installer will not appear.

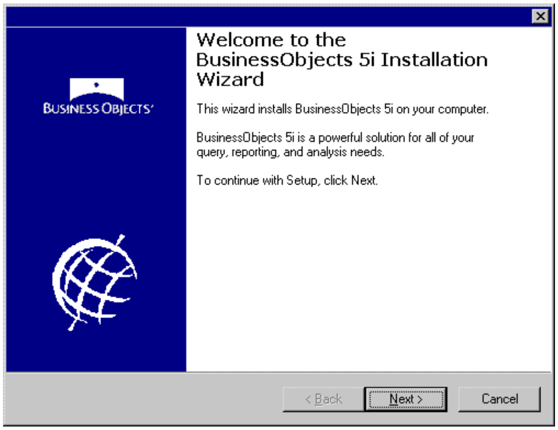
If the version of BUSINESSOBJECTS is updated on the server, you will be prompted to update your version of BUSINESSOBJECTS via the INFOVIEW portal.

To install and view a document in BUSINESSOBJECTS:

Note: To install through the portal, you must be logged in to your Windows 2000 machine as a local administrator.

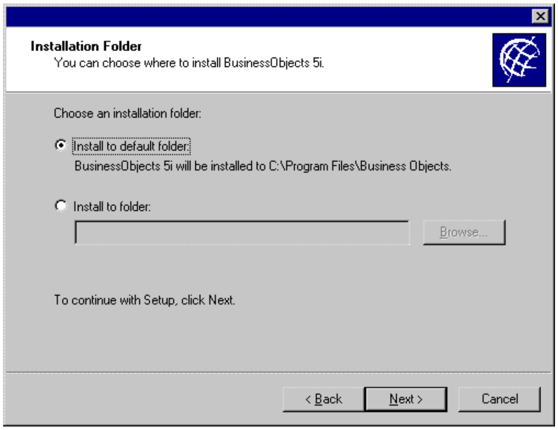
1. Click a BUSINESSOBJECTS document in any INFOVIEW document list to open it.

   If you do not already have BUSINESSOBJECTS installed, the BusinessObjects 5i installation wizard appears.



2. Click Next to continue installing.

   You are prompted to select a location for BusinessObjects 5i program files.



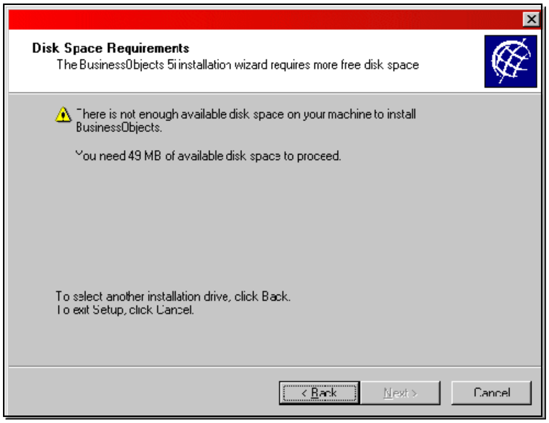
   By default, the files are installed to C:\Program Files\Business Objects.

3. If you want to install the files to another location, select *Install to folder*.

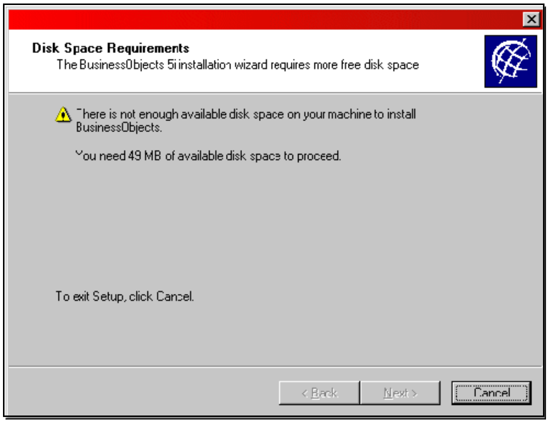
4. Enter a new path in the text box and click Next to continue.

The BusinessObjects 5i setup window appears.

Note: If you select a drive that does not have enough disk space available to download and install BUSINESSOBJECTS, one of the following error messages appears:
If you have the ability to change the installation drive, you have the option to go back in the installation wizard and choose another drive.

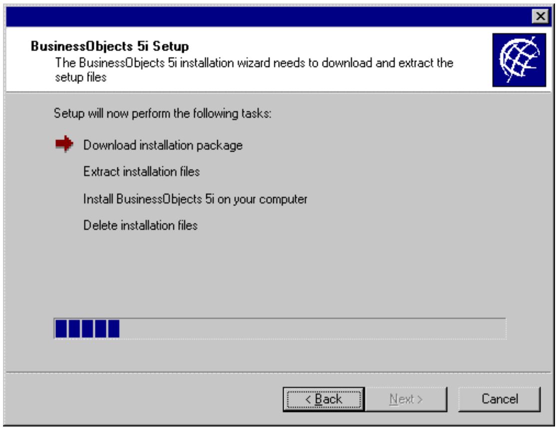


If you cannot choose the installation drive, contact you system administrator.



5. Click Next.

   6MB of compressed files are downloaded to your computer.



   Once the files are downloaded, they are uncompressed and installed. Once installed, BUSINESSOBJECTS will take up about 20MB of disk space.

6. If you do not have the correct version of VBA (Visual Basic for Applications) required to work with BUSINESSOBJECTS, you may be prompted to install it. To install the compatible version, check the box *Download and install VBA*, and click Next to continue installation

7. Click Finish to end the installation procedure.

   BUSINESSOBJECTS opens and displays the document.

Note: To view a BUSINESSOBJECTS document with macros or add-ins enabled, you must view it in BUSINESSOBJECTS. If you open a BUSINESSOBJECTS document with macros or add-ins in any other format the macros are disabled.
If you have version 5.1 or earlier of BUSINESSOBJECTS installed on your machine, you will not be able to update to the latest version through the INFOVIEW portal. To be able to install the updated version through INFOVIEW, you will first have to uninstall the existing version on your machine. Then you can follow the procedure "Viewing BusinessObjects documents in BusinessObjects".
If your user rights allow it, you may also be able to create and edit BUSINESSOBJECTS documents with BUSINESSOBJECTS. You set this option in the Create and Edit Documents tab of the Options page. For information about creating and editing documents with BUSINESSOBJECTS, refer to the *BusinessObjects User's Guide.*

Viewing Documents Created in Another Application

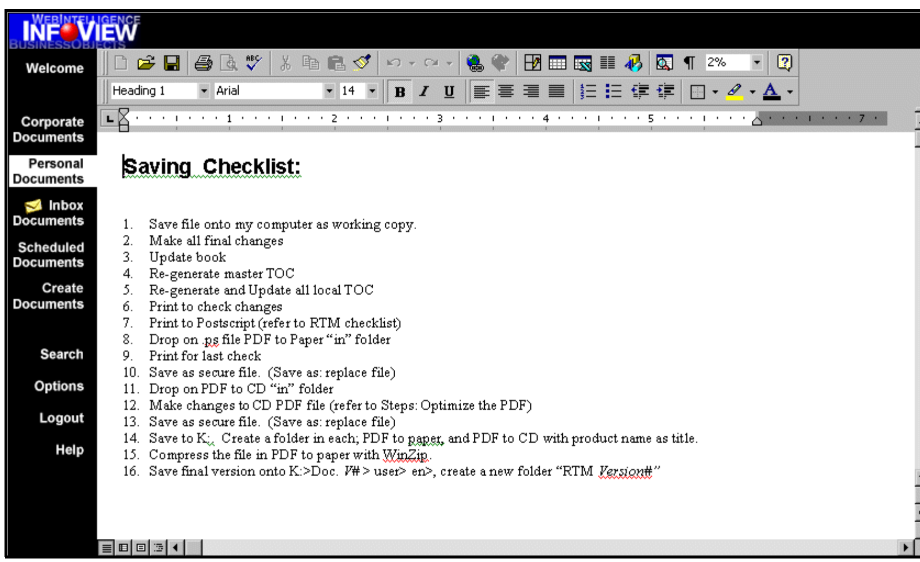
Your Documents lists may contain documents created in many applications other than BUSINESSOBJECTS and WEBINTELLIGENCE. You can view, send, publish, and download any of these documents if your user rights allow you to do so.

You must have the application that the document was originally created in installed on your computer to be able to view it. For example, if you want to view a Microsoft Word document in INFOVIEW, you must have Word installed.

Some examples of the types of documents you can view in INFOVIEW are:

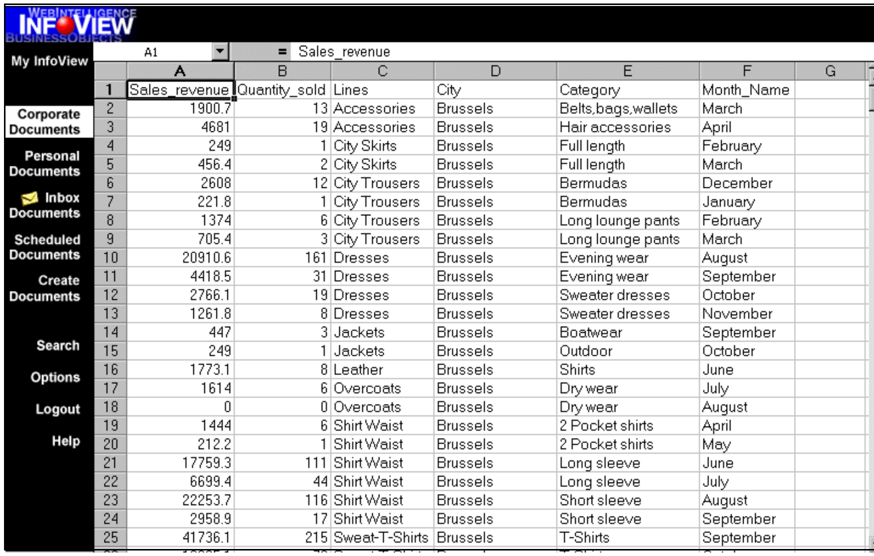
Example **Viewing Microsoft Word documents**

When you open a Microsoft Word document in INFOVIEW, it appears in Word format with the standard formatting toolbar.



Example **Viewing Microsoft Excel spreadsheets**

When you open an Excel spreadsheet, the document appears in an Excel page in the INFOVIEW window.

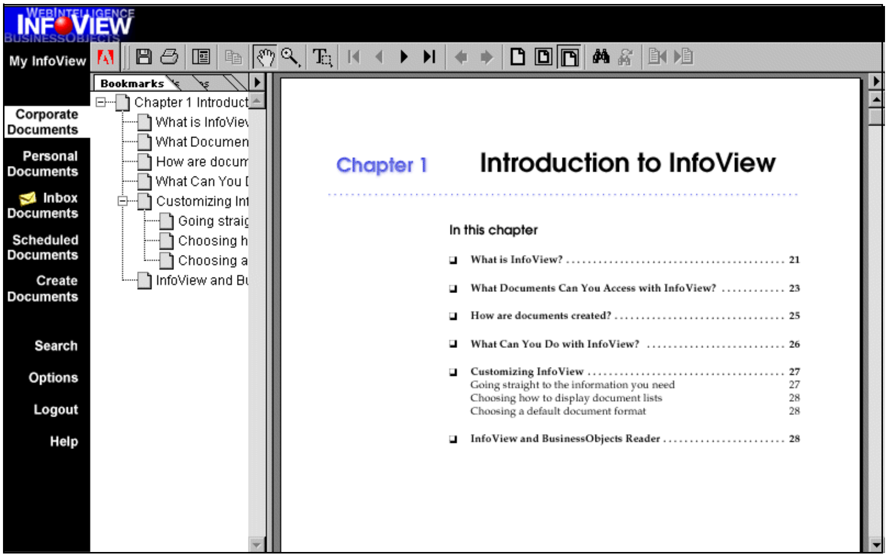


	A	B	C	D	E	F	G
1	Sales_revenue	Quantity_sold	Lines	City	Category	Month_Name	
2	1900.7	13	Accessories	Brussels	Belts,bags,wallets	March	
3	4681	19	Accessories	Brussels	Hair accessories	April	
4	249	1	City Skirts	Brussels	Full length	February	
5	456.4	2	City Skirts	Brussels	Full length	March	
6	2608	12	City Trousers	Brussels	Bermudas	December	
7	221.8	1	City Trousers	Brussels	Bermudas	January	
8	1374	6	City Trousers	Brussels	Long lounge pants	February	
9	705.4	3	City Trousers	Brussels	Long lounge pants	March	
10	20910.6	161	Dresses	Brussels	Evening wear	August	
11	4418.5	31	Dresses	Brussels	Evening wear	September	
12	2766.1	19	Dresses	Brussels	Sweater dresses	October	
13	1261.8	8	Dresses	Brussels	Sweater dresses	November	
14	447	3	Jackets	Brussels	Boatwear	September	
15	249	1	Jackets	Brussels	Outdoor	October	
16	1773.1	8	Leather	Brussels	Shirts	June	
17	1614	6	Overcoats	Brussels	Dry wear	July	
18	0	0	Overcoats	Brussels	Dry wear	August	
19	1444	6	Shirt Waist	Brussels	2 Pocket shirts	April	
20	212.2	1	Shirt Waist	Brussels	2 Pocket shirts	May	
21	17759.3	111	Shirt Waist	Brussels	Long sleeve	June	
22	6699.4	44	Shirt Waist	Brussels	Long sleeve	July	
23	22253.7	116	Shirt Waist	Brussels	Short sleeve	August	
24	2958.9	17	Shirt Waist	Brussels	Short sleeve	September	
25	41736.1	215	Sweat-T-Shirts	Brussels	T-Shirts	September	

Note: The way the Excel document appears in your INFOVIEW window depends on the browser you use.
If your user rights allow it you can edit the cell contents of the spreadsheet.

Example **Viewing Portable Document Format (PDF) files**

When you view a PDF file in INFOVIEW, the standard Acrobat Viewer window and toolbar allows you to navigate and zoom on the document.



Other file types you may see in your document lists:

- Text files
- GIF and JPEG images

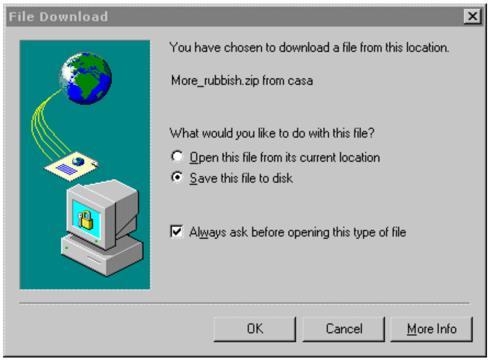
You must have the software that the document was created in installed on your machine. If you do not have the necessary software installed, you will be prompted to choose another application that is installed on you machine, or save the file.

It is possible to upload any document to the repository, but it is not possible to view all document types in your browser. Even if you cannot view the files, you can still distribute them to other users, or save it to your hard disk. The following are examples of files that you may find in your Documents lists, but cannot view in the INFOVIEW window:

- .ZIP files
- Executable files (for example, .bat, .com, .exe)
- Files with extensions that the operating system cannot recognize

Example **Opening a non-viewable .zip file in InfoView**

If you select to open a .zip file from any document list, the File Download dialog box is displayed.



You can choose to Run the file from its current location, which allows you to view the contents of the file, or Save the file to disk, which allows you to save the file to your computer.

Refreshing Documents

A document generated some period of time ago accurately reflects the data as it existed at that time, but may be inaccurate now. You can update WEBINTELLIGENCE and BUSINESSOBJECTS documents, keeping the same formatting but querying the database for the most recent data. This is known as *refreshing* it.

Documents can be refreshed in two ways:

- Manually
- Automatically at specific times or intervals
  This type of scheduled refresh in fact represents a way of distributing documents using a powerful BUSINESSOBJECTS server product called BROADCAST AGENT.

Refreshing a document manually

You can refresh any document manually as long as you have refresh rights to the universe used to create the document.

To refresh a document manually:

1. Click the document's name in any InfoView document list to open it in the Document Results page.
2. Click Refresh in the toolbar.

INFOVIEW submits the document to the server for refreshing, then displays the new results on the Document Results page.

If the document contains a user prompt, however, a dialog box appears instead, prompting you for information. For complete information, see the following section.

Viewing or Refreshing Documents with Prompts

Some documents can contain conditions, which allow readers to limit the data in a document. Instead of viewing a large document with a large quantity of information, they can choose to view only the information they need.

The following illustrations show how a condition works.

You can apply a condition to Country by selecting one of its values: US.

Country	Quarter	Revenue
FRANCE	Q1	$208,565.00
FRANCE	Q2	$242,165.00
FRANCE	Q3	$226,125.00
FRANCE	Q4	$158,565.00
US	Q1	$582,051.00
US	Q2	$579,652.00
US	Q3	$658,572.00
US	Q4	$630,829.00

Only the data for that value is now displayed.

Country	Quarter	Revenue
US	Q1	$582,051.00
US	Q2	$579,652.00
US	Q3	$658,572.00
US	Q4	$630,829.00

A condition can also affect calculations. For example, the total number of guests for all resorts changes when you restrict the data to a single resort instead of all resorts.

Document designers can include condition *prompts* in documents, which means that when you open or refresh the document, you are asked to provide information that will restrict the data contained in the document. For example, you are asked to enter the particular year for which you want financial information. If you don't provide this information, you cannot view the document.

The types of prompts you can encounter may vary slightly according to whether the document was created using WEBINTELLIGENCE or BUSINESSOBJECTS, but in general, you can be asked for information in two ways:

- A dialog box appears prompting you to select one or more values from a pre-defined list:

  In this case:

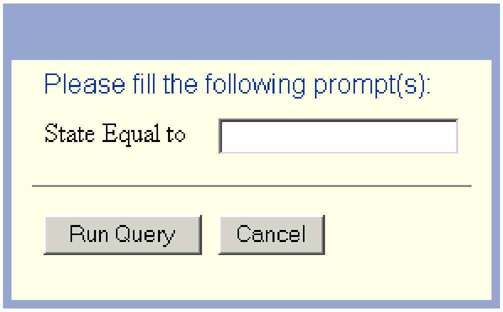
  - Refresh the list of values by clicking the Refresh List button.

    The values in the prompt list may change, for example, if a resort is opened in a country that wasn't previously on the list. In this case you would want to refresh the list of prompts to include the new country.

  - Select a value from the list, then click OK.

    The size of the list box adapts to the number of displayed values. A maximum of 6 values can be displayed in the list box. If there are more than 6 values you must scroll down to view the full list of values.
    The updated document opens in the Document Results page.

- An entry box appears prompting you to enter a value.



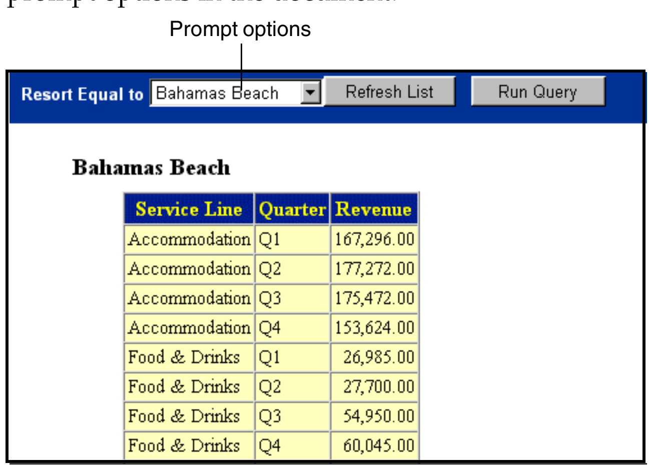
You must enter a value before you can run the query or refresh the document.

Note: If no data in the database corresponds to this value, you receive the message “No data to fetch.” When you click OK, the entry box reappears. Enter a valid value then click OK.

Document designers can also create documents that automatically display the condition values that restrict the data in the document. Here’s an example, which also explains how to get a different viewpoint on the information in the document.

Example **A document with condition values displayed**

Your document designer set a condition on the Resort object and displayed the prompt options in the document:



Service Line	Quarter	Revenue
Accommodation	Q1	167,296.00
Accommodation	Q2	177,272.00
Accommodation	Q3	175,472.00
Accommodation	Q4	153,624.00
Food & Drinks	Q1	26,985.00
Food & Drinks	Q2	27,700.00
Food & Drinks	Q3	54,950.00
Food & Drinks	Q4	60,045.00

The condition is set to Bahamas Beach. Therefore, the only resort information displayed pertains to Bahamas Beach.

If you want, you can get a different viewpoint on your data by selecting a different value directly from the prompt options in the Document Results page. But before you select to view a different resort, you will refresh the list of prompt options. Some new resorts might have been added to the list since the document was created, and when you refresh the list, the new data is retrieved from the database. To do this:

1. Click the down arrow next to the current condition value, Bahamas Beach in this case.
2. Click Refresh List to update the list of condition values.
3. Select a new value from the list.
4. Click Run Query to update the document with information pertaining to the condition value you selected.

   The updated document opens.

Viewing Document Properties

Every document that you can view in INFOVIEW has certain properties, such as its description, the categories it belongs to, its keywords, and, if it's a corporate document, its selected refresh option.

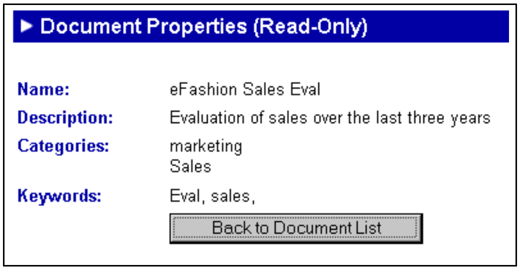
You can view any document's properties in the Corporate or Personal Documents pages by:

- Clicking the document's icon
- Displaying the document list in Expanded mode, then clicking the Properties link in the document's entry.

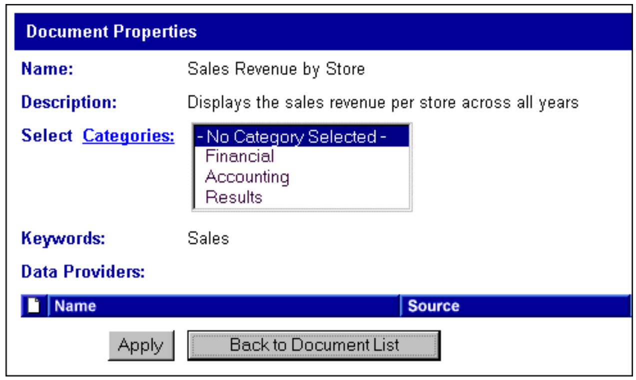
INFOVIEW has two pages for document properties:

- The Document Properties (Read-only) page lets you view but not modify the current document's properties.

  You see this page if you are neither a BUSINESSOBJECTS supervisor nor the document's owner (creator), and therefore do not have the right to modify the document's category or categories.



- The read-write Document Properties page lets you view all the document's attributes and modify the categories to which it belongs.



This page opens if you are a supervisor or the document's creator.

Using Document Categories

Over time, the document lists in your Corporate and Personal Documents pages can include so many documents that the lists are neither meaningful nor manageable.

Documents can be assigned to *categories*, attributes you can use to filter the documents into smaller subsets. By selecting a category from the Categories drop-down list box at the top of the Corporate and Personal Documents pages to filter the list to display only documents in the selected category.

For example, when you select Marketing in the Categories list box, only documents that were assigned to the Marketing category when they were published are listed. This makes the list of documents shorter and more manageable.

Managing categories

INFOVIEW handles two kinds of categories:

- You can use repository categories to filter lists of corporate documents. To create, update and delete these categories, you must have the rights to do so from the BUSINESSOBJECTS supervisor.

  Even if you have these rights, if you are not a supervisor yourself, you can only update and delete categories that you have created.

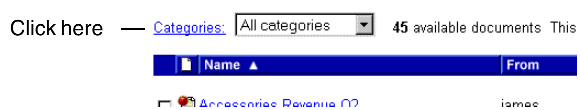
- You can use personal categories to filter your list of personal documents. You alone have the right to create, update, delete and use these categories.

Managing corporate categories

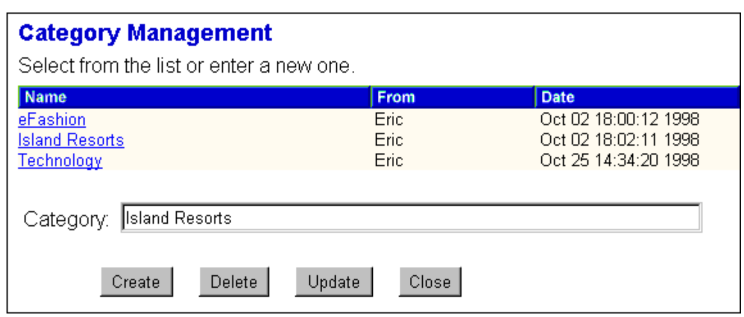
If your user rights allow it, you can manage repository categories in the Category Management page. You can access this page:

- From the Corporate Documents page
- From the Document Attributes page
- From the Publish page

In each of these pages, if you have the right to manage corporate repository categories, the Categories title next to the list box is underlined, indicating a hypertext link.



Click the link to display the Category Management page.



It displays all existing repository categories, their owners (the users who created them and therefore have update and delete rights for those categories), and the date each category was last saved. You cannot delete or update a category created by another user.

- To create a category, type the category's name in the Category entry box, then click Create. The new category appears in the list above.
- To update a category, select its name in the list. The name appears in the Category entry box below. Make your modifications, then click Update. The updated category name is inserted in the list.
- To delete a category, select its name in the list. The name appears in the Category entry box below. Click Delete. The category disappears from the list.

To close the Category Management page, click Close.

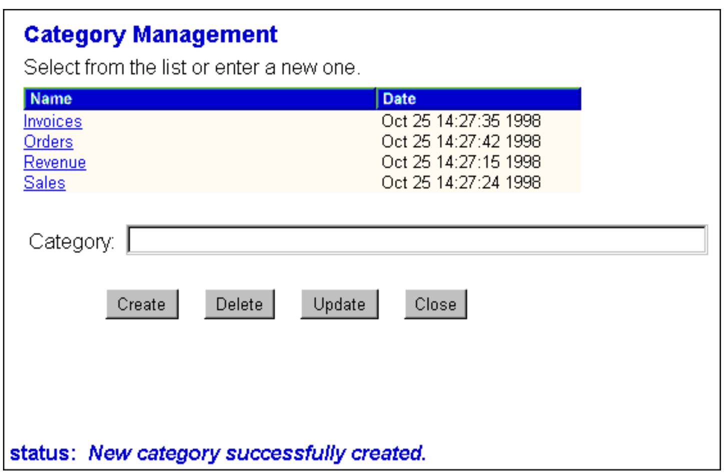
Managing personal categories

You manage personal categories in the personal Category Management page. You can access this page in any of the following manners:

- From the Personal Documents page
- From the Save page

In both these pages, the Personal Categories title next to the list box is underlined, indicating a hypertext link.

Click this link to open the personal Category Management page.



It displays all existing personal categories and the date each category was last saved.

- To create a category, type the category's name in the Category entry box, then click Create. The new category appears in the list above.
- To update a category, select its name in the list. The name appears in the Category entry box below. Make your modifications, then click Update. The updated category name is inserted in the list.
- To delete a category, select its name in the list. The name appears in the Category entry box below. Click Delete. The category's entry in the list disappears.

To close the personal Category Management page, click Close.

Assigning documents to categories

InfoView lets you assign:

- Corporate documents to repository categories
- Personal documents to personal categories

Assigning corporate documents to categories

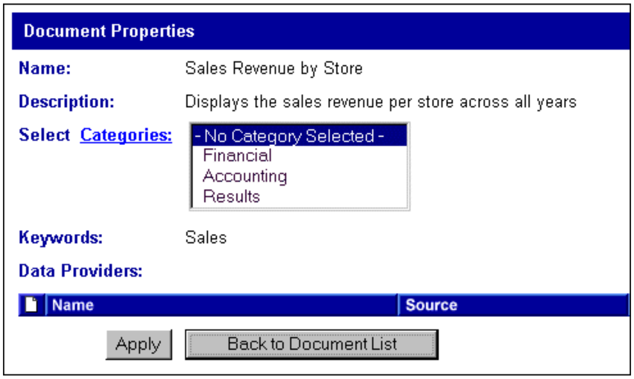
If your BUSINESSOBJECTS supervisor has given you the right, you can assign WEBINTELLIGENCE and BUSINESSOBJECTS documents to repository categories.

To assign a corporate document to a category, or to modify a corporate document's category, you must be the owner of the document or have supervisor rights.

You can assign a corporate document to a category in two ways:

- When you publish a new document.
- By modifying the document's properties in the Document Properties page. This way you don't have to actually open the document, then publish it.

  To do this, just click the document's icon in the document list.
  The Document Properties page is displayed:



The categories the document belongs to are highlighted in the Categories list.

- To assign a document to, or remove a document from a category, click the desired category in the list.
- To assign a document to, or remove it from multiple categories, hold down the Ctrl key while clicking each category.

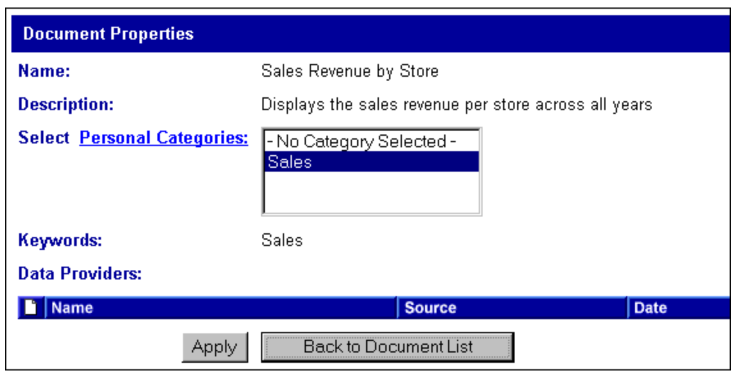
When you are done, click Apply.
To return to the document list, click the Back to Document List button.

Assigning personal documents to categories

You can assign a personal document to a personal category:

- When you save a document.
- By modifying the document's attributes in the Document Properties (Apply new categories) page.

  To do this, just click the document's icon in the Personal Documents page. The Document Properties page is displayed.



The categories to which the document belongs are highlighted in the Personal Categories list.

- To assign a document to, or remove a document from a category, click the category in the list.
- To assign a document to, or remove a document from multiple categories, hold down the Ctrl key while clicking each category.

When you are done, click Apply.
To return to the document list, click the Back to Document List button.

Filtering document lists by category

Once your personal and corporate documents have been assigned to categories, you can use those categories to display pertinent subsets of documents in your Personal and Corporate Documents pages.

For complete information, see "Filtering document lists" on page 43.

Uploading Documents

You can upload any document other than BUSINESSOBJECTS or WEBINTELLIGENCE documents from a location other than the corporate repository, such as your personal hard disk. This allows you to upload, for example, a Microsoft Excel spreadsheet, and publish it to the Corporate Documents list, save it to your Personal Documents list, or send it to another user.

The action you perform on the document depends on which document list you are viewing. You must have the appropriate version of the application that the document was created in installed on your computer to be able to view it inINFOVIEW. The following table shows you some examples of document types you can upload and view in INFOVIEW:

Icon	Document Type
	Portable Document Format (PDF)
	Microsoft Word document
	Microsoft Excel spreadsheet
	Microsoft PowerPoint
	Unidentified file type

The upload feature also allows you to use InfoView as a method of distributing files within your company. The following are examples of files that you can distribute to other users through the repository:

- .ZIP files
- Executable files (for example, .bat, .com, .exe)
- Files with extensions that the operating system cannot recognize

To view the contents of one of these file types, for example a .zip file, click the file name and choose to Open this file from current location or Save this file to disk.

Note: You cannot upload agnostic documents that have no file extension.

Upload a document and publish as corporate document

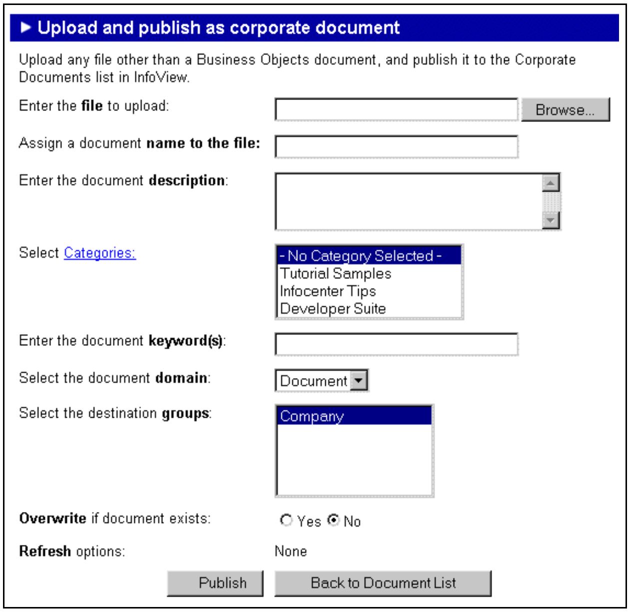
To upload a document and make it available to other users:

1. Click Corporate Documents in the navigation bar.

   The Corporate Documents list is displayed.

2. Click Upload in the top bar.

   The Upload and publish as corporate document window appears.



3. Click Browse to search for the document, or enter the file name with its path in the *Enter the file to upload* text box.

4. Enter a name for the document in the *Assign a document name to the file* text box.

5. In the document description box, enter a description if you wish. Descriptions are displayed in document lists when the document list is in Expanded mode.

6. If you wish, assign the document to one or more corporate categories by highlighting your choice(s) in the Select categories list:
   - To assign the document to a single category, click the category in the list box.
   - To assign the document to more than one category, hold down the Ctrl key while clicking the desired categories in the list box.

- If the document is already assigned to a category and you want to remove it, just click the highlighted category. To remove the document from multiple categories, hold down the Ctrl key while clicking the categories.
- If you want to assign the document to a category that isn't in the category list, click Categories to open the Category Management page. For information about creating personal categories, see "Managing categories" on page 97.

7. You can also enter one or more keywords to serve as search criteria for this document.

8. Select the groups to which you want to make this document accessible. Available groups are listed in the accompanying listbox.

9. If you want this document to overwrite any other document with the same name, select yes for the option, *Overwrite if document exists*.

10. Click Publish.

    A message confirms that the document has successfully been published.

Upload a document and save as personal document

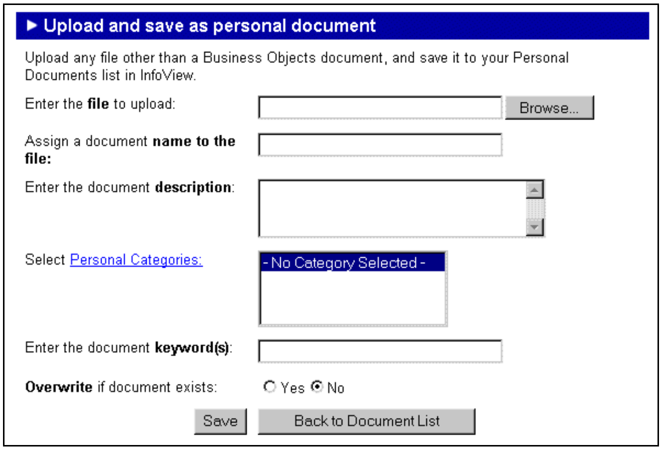
To upload a document and save it for your own personal use:

1. Click Personal Documents in the navigation bar.

   The Personal Documents list is displayed.

2. Click Upload in the top bar.

   The Upload and save as personal document window appears.



3. Click Browse to search for the document, or enter the file name with its path in the *Enter the file to upload* text box.

4. Enter a name for the document in the *Assign a document name to the file* text box.

5. In the document description box, enter a description if you wish. Descriptions are displayed in document lists when the document list is in Expanded mode.

6. If you wish, assign the document to one or more corporate categories by highlighting your choice(s) in the Select categories list:
   - To assign the document to a single category, click the category in the list box.
   - To assign the document to more than one category, hold down the Ctrl key while clicking the desired categories in the list box.
   - If the document is already assigned to a category and you want to remove it, just click the highlighted category. To remove the document from multiple categories, hold down the Ctrl key while clicking the categories.

- If you want to assign the document to a category that isn't in the category list, click Personal Categories to open the Category Management page. For information about creating personal categories, see "Managing categories" on page 97.

7. You can also enter one or more keywords to serve as search criteria for this document.
8. If you want this document to overwrite any other document with the same name, select yes for the option, *Overwrite if document exists*.
9. Click Save.

   A message confirms that the document has successfully been saved.

Upload a document and send it to other users

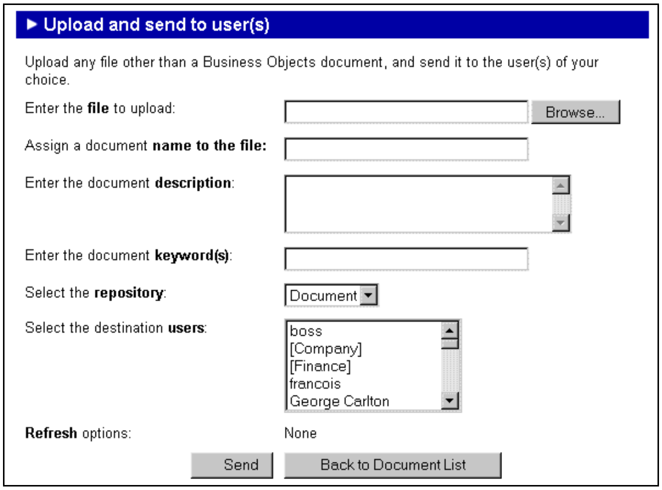
To upload a document and send it to specific users or groups:

1. Click Inbox Documents in the navigation bar.

   The Inbox Documents list is displayed.

2. Click Upload in the top bar.

   The Upload and send to users window appears.



3. Click Browse to search for the document, or enter the file name with its path in the *Enter the file to upload* text box.

4. Enter a name for the document in the *Assign a document name to the file* text box.
5. In the document description box, enter a description if you wish. Descriptions are displayed in document lists when the document list is in Expanded mode.
6. If you wish, enter one or more keywords to serve as search criteria for this document.
7. Select the users to whom you want to send this document.

   Available users are listed in the accompanying listbox.
8. Click Send.

   A message confirms that the document has successfully been sent.

Saving Documents

When you save a document, you save it to your Personal Documents storage area. You are the only person who can access these documents. This allows you to create your own personal documents, modify shared documents for your own purposes, and create different versions of standard documents.

When you save a document, you can also:

- Assign it to one or more existing categories and modify previous category assignments.

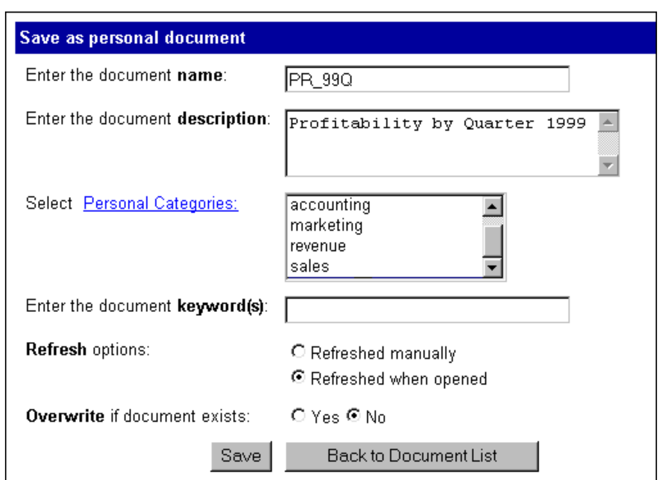
  If you want to create, update or delete your personal categories, you can do it directly from the Save page.

- Define keywords for it.

To save a document:

1. Do one of the following:
   - If the document is open in the Document Results page, click Save in the toolbar.
   - From a document list, display the list in Expanded mode, then click Save in the document entry's last line.

   The Save page opens.



   At any point before you actually save the document by clicking the Save button on this page, you can return to where you were in INFOVIEW by clicking the Back to Document or Back to Document List button.

2. In the document name box, enter the document's name.

3. In the document description box, enter a description if you wish. Descriptions are displayed in document lists when the document list is in Expanded mode.

4. If you wish, assign the document to one or more personal categories by highlighting your choice(s) in the Personal Categories list:
   - To assign the document to a single category, click the category in the list box.
   - To assign the document to more than one category, hold down the Ctrl key while clicking the desired categories in the list box. This creates a multiple selection.
   - If the document is already assigned to a category and you want to remove it, just click the highlighted category. To remove the document from multiple categories, hold down the Ctrl key while clicking the categories.
   - If you want to assign the document to a category that isn't in the category list, click Personal Category to open the Category Management page. For information about creating personal categories, see "Managing categories" on page 97.

5. You can also, enter one or more keywords to serve as search criteria for this document.

6. Select a refresh option:
   - Refreshed manually, if you want the document to be refreshed only when the reader requests.
   - Refreshed when opened, if you want the document to be refreshed each time it is opened.

7. If you want this version of the document to overwrite any pre-existing versions currently in your personal storage area, select Yes for the option, *Overwrite if document exists*.

8. Click Save.

   A flashing message confirms that InfoView has successfully saved the document.

Printing Documents

INFOVIEW makes it easy to print your WEBINTELLIGENCE or BUSINESSOBJECTS documents, but the results you obtain vary depending on whether you are printing a standard HTML document, or a BUSINESSOBJECTS document in enhanced format.

Printing WebIntelligence or BusinessObjects HTML documents

Printing WEBINTELLIGENCE documents, or BUSINESSOBJECTS documents in HTML format, is very different from printing standard BUSINESSOBJECTS documents. These documents are prepared as HTML pages to be displayed in a Web browser. When you print a document, the headers, footers, width and the number of printed pages per HTML page are all determined by the browser.

To print a document displayed in the standard HTML viewer, simply choose File | Print in your browser.

You may be able to improve the appearance of printed HTML documents by activating more printing options in your browser. Here is an example.

Example **Improving the appearance of printed HTML documents**

In Microsoft Internet Explorer 4.0 or later, choose Internet Options from the View menu. Click the Advanced tab in the Internet Options dialog box. Scroll down until you reach the Printing section. Check the Print background colors and images option, then click OK.

Printing BusinessObjects documents in enhanced format

To print a BusinessObjects document when using the enhanced viewer format, click the Print button in the document viewer toolbar.

Note: The Page Setup button in the toolbar lets you set margin size, paper format, and page orientation.

Printing BusinessObjects documents has one restriction: you cannot print BusinessObjects documents on text-only printers.

Printing BusinessObjects documents in PDF format

To print a BusinessObjects document when viewing it in PDF format, click the Print button in the Adobe PDF viewer toolbar.

Loading Document Data into a Spreadsheet

You can load the data from any WEBINTELLIGENCE document into a .csv spreadsheet such as Microsoft Excel, simply by pressing a button. You can do this from two different places:

- From the Corporate Documents, Personal Documents, and Inbox Documents pages (in Expanded mode), click Load into spreadsheet in the last line in the document entry.
- From an open WEBINTELLIGENCE document, click Download in the toolbar.

By default, INFOVIEW tries to load the data results into Excel. If Excel isn't installed, the browser prompts you to indicate an installed application associated with files with the extension .csv.

If you have already done this, you are not prompted, and your browser loads the document data into the application you specified.

INFOVIEW also allows you to specify another spreadsheet application for this purpose.

Different results in different browsers

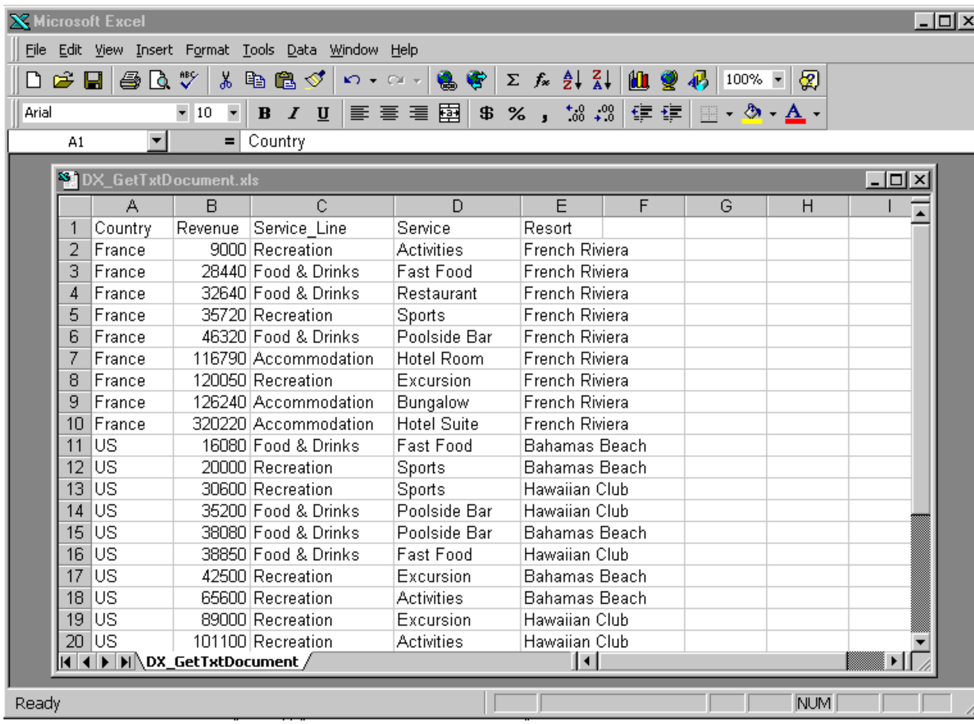
This feature differs according to the browser you are using:

- If you are using Internet Explorer, the spreadsheet is shown directly in the browser.
- If you are using a Netscape browser, an Excel session is opened and appears next to the INFOVIEW session indicator in the taskbar. The spreadsheet containing the data is opened in the Excel session.

  The following example shows data from INFOVIEW loaded into a spreadsheet.

Example **How data from InfoView appears in a spreadsheet**

A WEBINTELLIGENCE document's data loaded into Microsoft Excel from a Netscape browser, for example, looks like this:



	A	B	C	D	E
1	Country	Revenue	Service_Line	Service	Resort
2	France	9000	Recreation	Activities	French Riviera
3	France	28440	Food & Drinks	Fast Food	French Riviera
4	France	32640	Food & Drinks	Restaurant	French Riviera
5	France	35720	Recreation	Sports	French Riviera
6	France	46320	Food & Drinks	Poolside Bar	French Riviera
7	France	116790	Accommodation	Hotel Room	French Riviera
8	France	120050	Recreation	Excursion	French Riviera
9	France	126240	Accommodation	Bungalow	French Riviera
10	France	320220	Accommodation	Hotel Suite	French Riviera
11	US	16080	Food & Drinks	Fast Food	Bahamas Beach
12	US	20000	Recreation	Sports	Bahamas Beach
13	US	30600	Recreation	Sports	Hawaiian Club
14	US	35200	Food & Drinks	Poolside Bar	Hawaiian Club
15	US	38080	Food & Drinks	Poolside Bar	Bahamas Beach
16	US	38850	Food & Drinks	Fast Food	Hawaiian Club
17	US	42500	Recreation	Excursion	Bahamas Beach
18	US	65600	Recreation	Activities	Bahamas Beach
19	US	89000	Recreation	Excursion	Hawaiian Club
20	US	101100	Recreation	Activities	Hawaiian Club

Modifying your choice of spreadsheet application

By default INFOVIEW uses Microsoft Excel as the spreadsheet application when you request the loading of document data into a spreadsheet. You can also define another spreadsheet application by changing the browser's MIME (Multipurpose Internet Mail Extension) types.

The World Wide Web uses MIME types to define the type of a particular piece of transferred information. A browser in turn determines, from the MIME type, how the data should be treated. Each browser has a configuration (menu or file) that maps the types of the data to particular functions.

A browser can handle many types of data itself (e.g. HTML documents, GIF images) while other types are passed to auxiliary programs, such as image viewers, movie or sound players -- or in this case, spreadsheet applications.

You can define the new spreadsheet setting either in your browser's file type configuration file, or if you are using a recent Microsoft browser, in the Windows File Types settings.

Below are two examples. If you are using a different browser or browser version, see its on-line help for instructions.

Example **Choosing a spreadsheet application with Windows Internet Explorer 4.0**

1. In Windows Explorer, on the View menu, click Options.
2. Click the File Types tab.
3. In the list of file types, click BUSINESSOBJECTS document.
4. Click Edit.
5. In Actions, click Open.
6. Click Edit.
7. In *Application used to perform action*, enter the spreadsheet program you want to use to open BUSINESSOBJECTS document files, then click OK.

The settings for selected file types are shown in File type details.

Example **Choosing a spreadsheet application with Netscape version 4.***

1. Select Edit | Preferences.

   The Preferences dialog box opens.

2. In the Category browser to the left, click Applications, located beneath Navigator.

3. In the Description listbox, select Microsoft Excel Worksheet, then click the Edit button. The Edit Type dialog box opens.

4. In the MIME Type field, type the mime type used by the desired application. Ask your system administrator or the application manufacturer's technical support for the exact information to enter.

5. In the Application box, type or select the name and complete path of the desired application.

6. Click OK.

Downloading BusinessObjects Documents

When you view a BUSINESSOBJECTS document from INFOVIEW, you are either working in WEBINTELLIGENCE with an HTML version of the original document, or a version adapted for the ActiveX viewer (enhanced document format). If your user rights allow it, you may also view the document in BUSINESSOBJECTS.

You can also download the original BUSINESSOBJECTS .rep file so that you can work on it using BUSINESSOBJECTS on your local machine. The person who sent or published the BUSINESSOBJECTS document used an option, to enable you, the INFOVIEW user, to download the document from your Web browser. This option, *BusinessObjects Document*, is described under “Setting HTML Options” on page 223.

How you download documents is described below under "To download documents". If the download options described do not appear in INFOVIEW, contact the person who sent or published the document, and have them either resend or republish the document with the *BusinessObjects Document* option switched on in BUSINESSOBJECTS.

Requirements for downloading documents

From INFOVIEW, you can download documents coming from different versions of BUSINESSOBJECTS: versions 4.1 and 5.x.

- To download BUSINESSOBJECTS 4.1 documents, you must have BUSINESSOBJECTS 4.1 or later installed on your computer. You can open BUSINESSOBJECTS 4.1 documents in BUSINESSOBJECTS 4.1 or 5.x.
- To download version 5.x documents, you must have version 5.x installed on your computer. You cannot download 5.x documents into BUSINESSOBJECTS 4.1.

To download documents

You can download the document to BUSINESSOBJECTS in either of two ways:

- From any INFOVIEW document list (in Expanded mode), you can download the original .rep file without even opening the document. Just click Load BusinessObjects Document in the last line in the document's entry.
- INFOVIEWFrom any open BUSINESSOBJECTS document, click the Download button in the toolbar.

Note: The first time you download a document, your browser displays an "unknown file" message and asks you if you want to open the file or save it to disk. Once you've made your selection, you are prompted to select the program to use to open the document.

Deleting Documents

You can delete any documents you want from your Inbox Documents and your Personal Documents page storage areas.

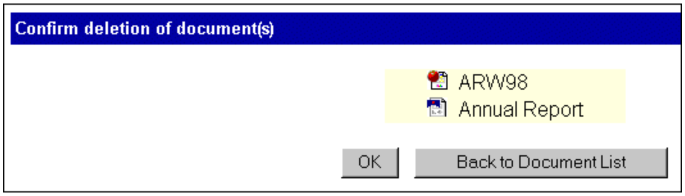
In the Corporate Documents page, you can delete any document you created, as well as other documents if you have the rights to do so.

Note: When you have the right to delete a corporate document, there is a small box next to the document name when you view the list in Compact mode.

To delete a document:

1. Do one of the following:
   - To delete one or more documents from a document list in Compact mode, just click the box next to the name of each document you want to delete, then click Delete in the toolbar.
   - To delete a document from a document list displayed in Expanded mode, click Delete in the last line of the document entry.
   - If the document is already open in the Document Results page, click Delete in the toolbar.

   The Delete page opens.



2. Click OK to confirm that you want to delete the document(s).

   At the bottom of the screen, a message tells you when INFOVIEW has successfully deleted the document(s).

Chapter 4 Publishing, Sending and Scheduling Documents

In this chapter

Publishing Documents

When you publish a document with INFOVIEW, you save it to a document domain in the common corporate repository. This allows multiple INFOVIEW, WEBINTELLIGENCE, and BUSINESSOBJECTS users to access the same document and information.

When you publish a document, you can also:

- Assign it to one or more categories, or modify previous category assignments, thus making it easier for other users to find this document.

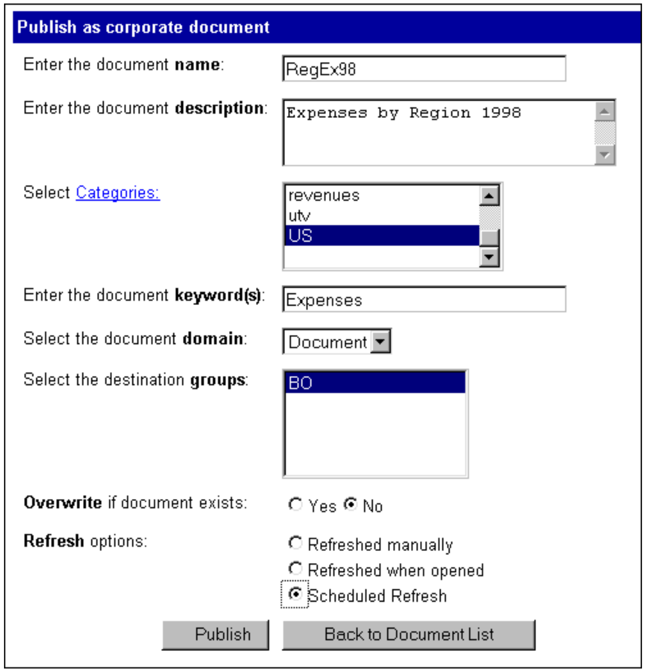
  For example, if this document contains information of interest to the marketing department in your company, you might assign the document to the “Marketing” category. When the document is published, people in Marketing can filter their Corporate Document lists to display only documents in that category.

- Schedule the document to be automatically refreshed and re-published through a BROADCAST AGENT in your cluster. If you don’t have the right to schedule documents or access the BROADCAST AGENT, this option is hidden.

To publish a document:

1. Do one of the following:
   - If the document is already open in the Document Results page, click Publish in the toolbar.
   - To publish a document from the Personal Documents or Inbox Documents page without opening it, display the document list in Expanded mode, then click Publish in the last line of the document entry.
   - To re-publish a corporate document, open it in the Document Results page, then click Publish in the toolbar.

The Publish page opens.



At any point before you actually publish the document by clicking Publish, you can return where you were in INFOVIEW by clicking the Back to Document or Back to Document List button.

2. By default, the document's current name appears as the document's name. If you want to change it, do so in the entry box.

3. In the document's description box, describe the document (optional).

4. If the document has already been assigned to one or more categories, the category is highlighted in the Categories list box.
   You can assign the document to one or more repository categories by highlighting your choice(s) in the Categories list. Select one of the following options to assign your document to one or more categories.
   - To assign the document to a single category, click the category in the list box.
   - To assign the document to more than one category, hold down the Ctrl key while clicking the desired categories in the list box. This creates a multiple selection.

- If the document already belongs to a category and you want to remove it, just click the highlighted category. To remove a document from multiple categories, hold down the Ctrl key while clicking the categories.
- If a desired category isn't in the list, click the Categories link to go to the Category Management page, where, if your user rights allow it, you can create new repository categories.

5. If you want, enter one or more keywords to serve as search criteria for this document.

6. Select the document domain in which you want to store the document.

The domains for which you have writing and modification rights are listed in the drop-down box. You can save to these domains *only*.

7. Select the group to which you want to make the document available. Available groups are listed in the accompanying listbox.

8. Click Yes or No for the option, Overwrite if document exists.
- If you select Yes, this document will replace any other document in the same document domain with the same name.
- If you select No, INFOVIEW will store this in the document domain with another document ID, and both documents will be available.

9. Choose a refresh option:
- Refreshed manually
  The document will be refreshed only when a user refreshes it manually.
- Refreshed when opened
  Whenever another user opens the document, INFOVIEW runs the document's query again, formats the document, and displays the document with the most up-to-date data.
- Scheduled Refresh
  INFOVIEW will automatically refresh the document at specific times or intervals, then re-publish it to the repository. For complete information about this scheduled refresh, and where to go from here, see "Scheduling Documents with Broadcast Agent" on page 125.

10. Click Publish.

A flashing message confirms that INFOVIEW has successfully published the document.

Sending Documents to Other Users

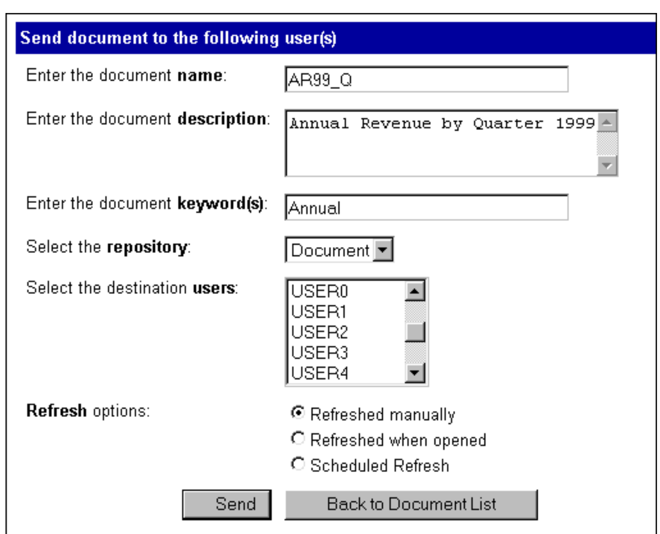
You can send WebIntelligence, BusinessObjects documents and other files that have been uploaded to the system, to other users.

When you send a document, you also define how you want the document to be refreshed. If your supervisor has given you the right, you can schedule WebIntelligence and BusinessObjects documents to be automatically refreshed and re-sent to the recipients you've defined through a Broadcast Agent in your cluster. If you don't have the right to schedule documents or access the Broadcast Agent, this option is hidden.

To send a document:

1. Do one of the following:
- To send a document from any InfoView document list without opening it, display the list in Expanded mode, then click the Send to users link in the last line of the document entry.
- If the document is already displayed in the Document Results page, click Send in the toolbar.

The Send page opens.



At any point before you actually send the document by clicking the Send button on this page, you can return to where you were in InfoView by clicking the Back to Document or Back to Document List button.

2. By default, the document's current name appears as the document's name. If you want to change it, do so in the entry box.

3. In the document description box, enter a description if you want. Descriptions are displayed in the document list when it's in Expanded mode.

4. If you want, enter one or more keywords to serve as search criteria for this document.

5. Select the document domain in which you want to store the document.

   The BUSINESSOBJECTS supervisor grants you read and write rights to document domains in the corporate repository. The document domains for which you have writing and modification rights are listed in a drop-down box. You can save to these domains *only*.

   If you have rights to more than one domain, and you don't know which one to choose, ask your supervisor.

6. Select the user(s) to whom you want to send this document.

7. Choose a refresh option for the document:
   - Refreshed manually
     The document will be refreshed only when a user refreshes it manually.
   - Refreshed when opened
     Whenever another user opens the document, INFOVIEW automatically runs the document's query again, formats the document, and displays the document with the most up-to-date data.
   - Scheduled Refresh
     INFOVIEW will automatically refresh the document at specific times or intervals, then send it to the users in your distribution list.
     For complete information about this type of refresh, and where to go from here, see "Scheduling Documents with Broadcast Agent" on page 125.

8. Click Send.

Scheduling Documents with Broadcast Agent

BROADCAST AGENT is a powerful BUSINESSOBJECTS server product that allows INFOVIEW and BUSINESSOBJECTS users to refresh then distribute documents via the repository, an intranet, or the World Wide Web.

With INFOVIEW, you can use BROADCAST AGENT to schedule any BUSINESSOBJECTS or WEBINTELLIGENCE document to be automatically refreshed at specific times, dates or intervals, then sent to users of your choice or published to the corporate repository. To make sure you get the latest updates of mission-critical information, you can even send yourself the pertinent documents, then schedule automatic refreshes for them. Each time the documents are refreshed, they will automatically be sent to you.

You can schedule document refreshes for off-peak times, for example at night, thereby reducing both daytime network traffic, and the risk that the task might not go through due to an overloaded network.

BROADCAST AGENT also supports condition-based processing, whereby a new task begins when and only when a certain condition has been met. This feature is called the File Watcher. For example, you can specify a file that must be present before BUSINESSOBJECTS processes the document.

A typical use of this feature is the database administrator who posts a text file to signal the successful reload of a data warehouse; when the text file is present in the specified location, BUSINESSOBJECTS refreshes and distributes the document(s).

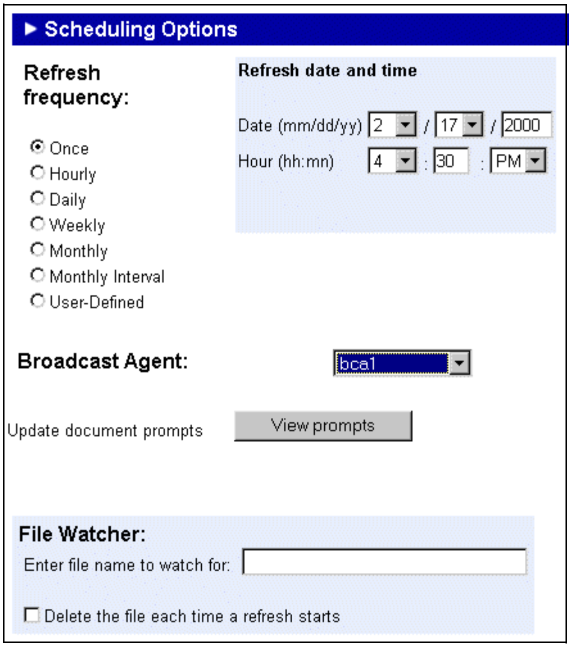
For detailed information about File Watcher, see page 131.

You can view the status of any document you have scheduled using BROADCAST AGENT. See “Monitoring your scheduled documents” on page 133.

To Schedule an automatic refresh for a Document:

1. Do one of the following:
- From the document’s Publish page, in the Refresh Options section, select the Scheduled Refresh option, then click the Publish button.
- In the Refresh Options section of the Send Page, select the Scheduled Refresh option, then click the Send button.

The Scheduling Options page opens.



The Refresh frequency section contains a series of predefined scheduling options to the left, including the possibility to define a different, customized schedule. When you select an option, the entry fields to the right change to fit the selected option.
For information about these options, see "Refresh scheduling options" below. Notice that you access the bottom part of the window using the scrollbar to the right.

2. More than one BROADCAST AGENT may be installed in your INFOVIEW cluster. In the Broadcast Agent field, choose the name of the BROADCAST AGENT you want to use.

3. If the document contains prompts, you can click View Prompts to update them.

4. In the File Watcher section:
   - If you want the document(s) to be refreshed only if a particular file is present, enter the path and filename of the file you want the File Watcher to check for.

- If you want that file to be deleted as soon as the refresh starts, check that option.

For detailed information about the File Watcher, see page 131.

5. Click OK.

   INFOVIEW displays a message confirming that the document has been successfully published or sent.

If the BROADCAST AGENT with which you scheduled your document is not running when you publish, the document is published anyway, but the subsequent refresh-and-republish schedule is not processed until BROADCAST AGENT is up.

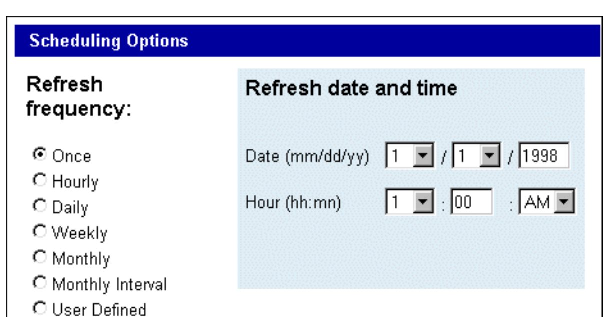
Note: You can make sure you receive regular updates of the documents that are critical to your work by sending those documents to yourself, and defining scheduled refreshes for them.

Refresh scheduling options

When you schedule a document for automatic refresh and distribution, you can choose from among the following scheduling options:

Once

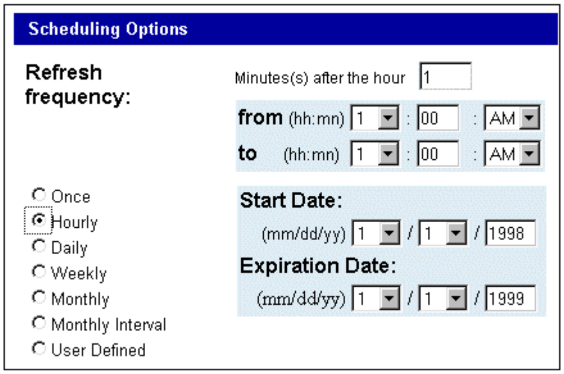
The Once option refreshes the specified document(s) once at a specified date and time. By default, the current date and time appear in the dialog box. You can enter a new date and time.



Hourly

The Hourly option refreshes the specified documents once an hour during the interval specified.

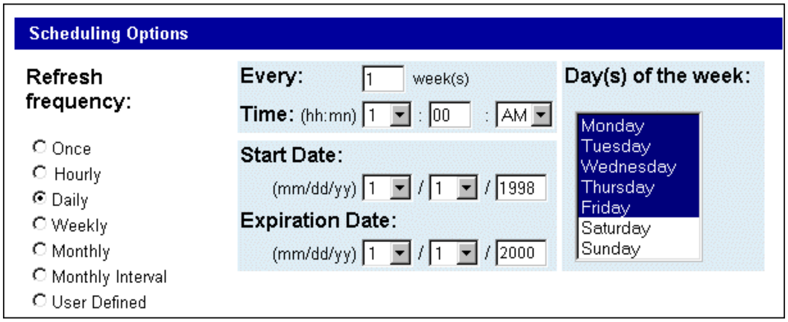
For example, if you specify 30 in Minutes after the Hour, 5 in From, and 8 in To, the task is processed three times: at 5:30, 6:30, and 7:30.



Daily

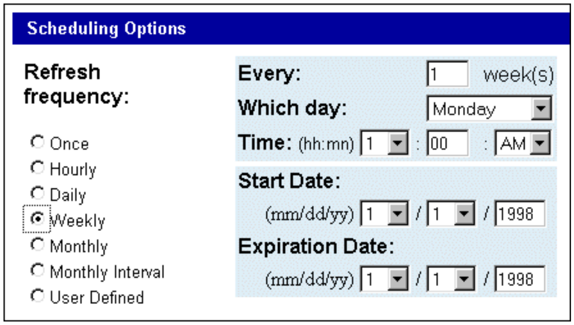
The Daily option refreshes the specified document(s) on one or more specified days of the week at a specified time, at weekly intervals.

Check the days you want to refresh the document(s).



Weekly

The Weekly option refreshes the document(s) on one day of the week at a specified time.

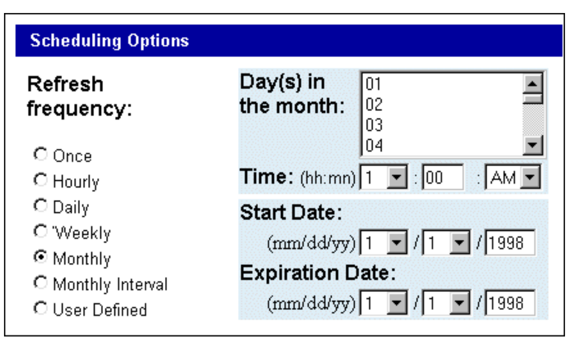


Monthly

The Monthly option refreshes the document(s) on selected days of the month at a specified hour.

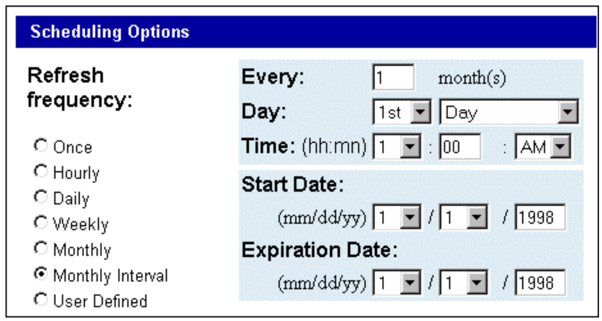
Check the days you want to process a document.

Note: Depending on the database used by the security domain, you cannot send a task if you select *1st Day of the month*.



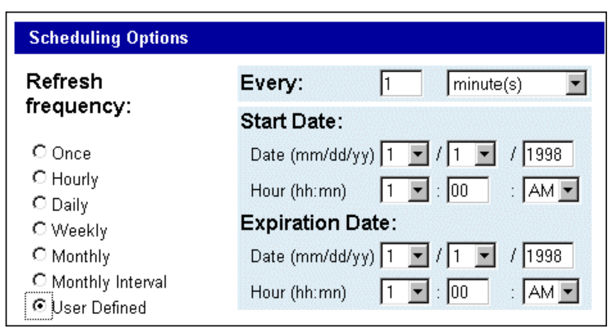
Monthly Interval

The Monthly Interval option refreshes the document(s) at the daily and monthly intervals you specify.



User Defined

The User defined option refreshes the document(s) at the interval you specify.



File Watcher Essentials

File Watcher is the BROADCAST AGENT feature that permits the processing of tasks when and only when a specified file is present in its specified location.

A typical use of this feature is the database administrator who posts a text file to signal the successful reload of a data warehouse; when the text file is present in the specified location, BROADCAST AGENT refreshes and distributes the document(s).

The File Watcher feature means that BROADCAST AGENT can interoperate with all existing systems, even legacy systems anywhere on the network. For example, a legacy system could create a file that BROADCAST AGENT is watching for. BROADCAST AGENT would then execute the scheduled task. This would create a new document that in turn would trigger the creation of another document. This cascading chain of reactions and documents depending on specific conditions is called “report chaining.”

What kind of file can you use?

You can use any kind of file.

Where can the file be located?

The file can be located wherever you want--on a server, on the client or on a file system--as long as the BROADCAST AGENT machine can access the file where it has been defined.

What kind of access rights are required?

Each BROADCAST AGENT has a component called BusinessObjects Manager. The Manager is a server-based version of BUSINESSOBJECTS that allows BROADCAST AGENT to display and refresh BUSINESSOBJECTS documents.

When BROADCAST AGENT detects a document in the repository that is due to be processed, its BusinessObjects Manager launches a BUSINESSOBJECTS session, which extracts the document from the repository and processes it.

Each BusinessObjects Manager is configured with the user name and password of an NT user, and therefore has defined access rights to machines, disks and directories.

In order to use the File Watcher, the BusinessObjects Manager used for a particular task must have access rights to the specified file and location.

For example, if you enter x:\Temp\Business Objects\file.txt in the File Watcher box in the Scheduling Options page, the BusinessObjects Manager associated with the BROADCAST AGENT you’ve chosen must have read rights for the server x and the directory Temp\Business Objects on that machine.

How do you indicate where to find the file in the Scheduling Options dialog box?

You can use either of two name and path conventions:

- A standard local or remote pathname, such as c:\Program Files\Business Objects\Demo\file.txt, or x:\Temp\Business Objects\file.txt
- A valid UNC

  UNC stands for Universal Naming Convention, PC format for specifying the location of resources on a local-area network (LAN). UNC uses the following format:
  `\\server-name\shared-resource-pathname`
  So, for example, to access the file.txt file in the directory examples on the shared server silo, enter:
  `\\silo\examples\file.txt`

Note: We highly recommend that you use a UNC. Why? Because BROADCAST AGENT is distributed, and therefore a scheduled job may run on one of any number of servers.

If you use a remote path name, the drive used must be properly configured on the BOManager server if it is to find the file. When you use a UNC, however, the name of the server or PC on which the file is located is included, thereby ensuring that the BROADCAST AGENT server can find it.

What happens if Broadcast Agent can't find the file?

If the BROADCAST AGENT can't locate the file at task execution time, it simply doesn't run the task.

What rights are required to delete the file after task execution?

The Scheduling Options page contains the option *Delete the file each time a refresh starts*. If you check it, the BusinessObjects Manager used for the task must have read *and* write rights to the specified file and location.

Monitoring your scheduled documents

You can view the progress of the documents you've sent to BROADCAST AGENT by running the BROADCAST AGENT Console. You use this Console to:

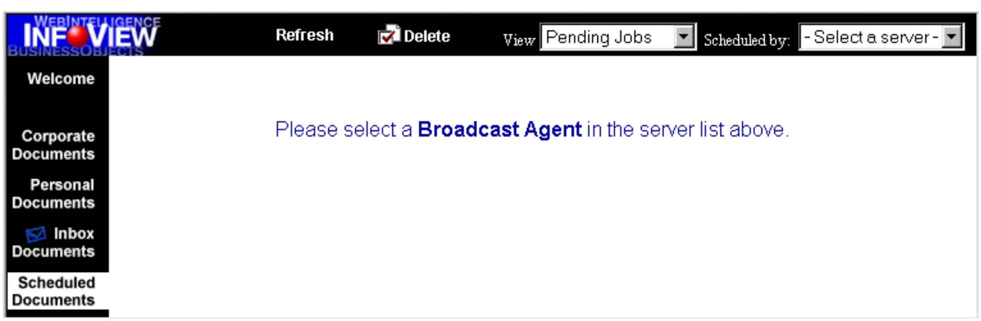
- See which documents have been successfully processed
- Check information about scheduled documents, such as their status, refresh schedule and size
- Get information on task failure so that you can fix errors that have occurred
- Delete scheduled tasks if necessary

The BROADCAST AGENT Console lists the documents sent for processing. For each document, the Console displays information such as document name, status, refresh frequency, and so forth.

Opening the Broadcast Agent Console in InfoView

To open the Console:

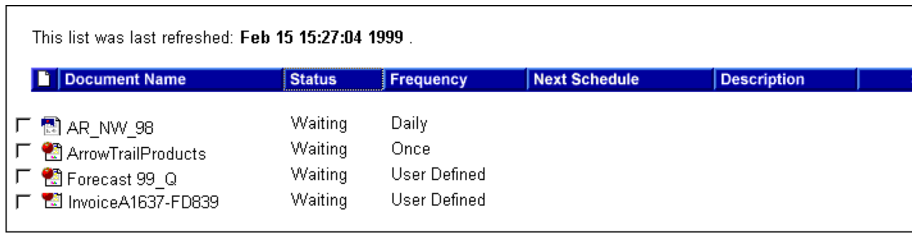
1. Click Scheduled Documents in the INFOVIEW navigation bar. The following appears.



2. In the View listbox in the toolbar, select one of the following lists:
   - Pending Jobs to view documents still awaiting refreshing and distribution As long as a document is still scheduled to be refreshed and distributed, it is in this list.
   - All Jobs Log to view the status of all the documents that you have scheduled
   - Failed Jobs Log to view all the jobs that have not been successful, along with a description of the problem

3. In the Scheduled by listbox in the toolbar, choose the name of the BROADCAST AGENT on which you scheduled the document refresh(es).

- If you haven't yet scheduled a document on the selected BROADCAST AGENT, a message appears.
- If you have scheduled at least one document on the selected BROADCAST AGENT, the Broadcast Agent Console opens, displaying the type of list you requested in Step 2.



For each document, the Console displays information such as its name, status, refresh frequency, description and size.

Understanding task status

Tasks displayed in different lists have different status values.

- Tasks in the Pending Jobs list can have the following status:

Status	Description
Waiting	Scheduled for later processing.
Suspended	Task with Waiting status that is paused. You cannot suspend a task, but the Supervisor or system administrator can.
Running	Currently processing. Changes status to Successful or Failed after processing.
Delayed execution	Has reached scheduled processing date and is on standby to be processed when currently running tasks are completed.
Retrying	Failed task that is being reprocessed.

- Tasks in the Failed Jobs list can have the following status:

Status	Description
Failure	Task processing failed.

- Jobs in the All Jobs Log can have the following status:

Status	Description
Expired	Task schedule has expired.
Failed	Task processing failed.
Successful	Task processing was successful.

Deleting a scheduled document

You can delete a scheduled document from the BROADCAST AGENT Console by checking the box preceding its entry, then clicking Delete in the toolbar.

You can check several documents, then delete them all at once if you want.

Note: You cannot modify a document's schedule from the Console. If you want to make a change, you must delete the task in the Console, then return to the document's INFOVIEW Send or Publish page and schedule the document again.

Closing the Console

To close the BROADCAST AGENT Console, either click your browser's Back button or click any link in the navigation bar to go to another part of INFOVIEW.

Chapter 5 Troubleshooting

In this chapter

General Advice

In order to log into INFOVIEW, your browser needs to be cookie-enabled. For instructions, consult your browser’s on-line help.

To prevent any problems using INFOVIEW, run the browser configuration check by clicking its link in the INFOVIEW Login page.

Try to empty your browser’s memory cache regularly. Having a large part of your disk allocated to the cache can slow down the operation of your computer (especially if you have little free disk space already). For instructions, consult your browser’s on-line help.

You should also set your browser to check for newer versions of the stored page every time you visit the page. For instructions, consult your browser’s on-line help.

Common Problems

The following is a list of problems you may encounter when using INFOVIEW over the Web, as well as possible solutions. If these solutions still don’t resolve your problem, contact your system administrator for help.

- When you try to log in, an error message appears.
- Problems occur when you try to load a document’s data into a spreadsheet.
- When you try to take an action on a document, the error message appears: “The document contains no data.”
- You have received the message, “This name already exists, use a different name or allow overwrite.”
- You have received the message “The required service is not available.”
- The Send or Publish window is only partially displayed.

When you try to log in, an error message appears.

You have provided your username and ID in the INFOVIEW login page, and you get an error message instead of INFOVIEW.

What you can do

- Your login information may be incorrect. In this case, you should contact your INFOVIEW administrator or the BUSINESSOBJECTS supervisor who created your user profile.
- If you're using Microsoft Internet Explorer 2, you will be unable to login. INFOVIEW requires a cookie containing login information and a session ID in order to connect you to the INFOVIEW system.

Problems occur when you try to load a document's data into a spreadsheet.

What you can do

When you load data from a document into a spreadsheet, you may need to define the spreadsheet application you want to use.

Data imported into a spreadsheet is imported as text. This means that your computer's number settings affect the way the text is handled.

If the text from the WEBINTELLIGENCE document uses a decimal point as the decimal separator, your computer must do the same, otherwise the numbers will not be recognized. You will not be able to format them or make calculations. Typically, this occurs if your regional settings are for Continental European countries such as France and Germany, and you are using a decimal symbol used in a North American country (USA or Canada) or vise versa.

If you're using Windows, you can change the decimal separator in the Window's Control Panel's Regional Settings dialog box.

When you try to take an action on a document, the error message appears: “The document contains no data.”

You have tried to edit a document containing query results, or load its data into a spreadsheet or save it. The action does not take place, and an inappropriate error message appears indicating that the document contains no data.

What you can do

- The BUSINESSOBJECTS supervisor may have changed your access rights during the current session so that you no longer have access to the current document domain. In this case, contact the supervisor.
- The HTML page may simply need reloading. Click your browser’s Refresh or Reload button.
- You may need to log out of INFOVIEW, then log back in again.

You have received the message, “This name already exists, use a different name or allow overwrite.”

You have just tried to save a document to your personal storage area and a document with that name already exists.

What you can do

This message is simply prompting you do one of the following:

- Select Yes for the Overwrite if document exists option if you want to overwrite the existing document of that name, then click Save again.
- If you don’t want this document to overwrite the existing one, change this document’s name, then click Save again.

You have received the message “The required service is not available.”

You have taken any kind of action in INFOVIEW, such as opening a document list, or simply clicking a button in the toolbar or navigation bar, and you receive this message.

What you can do

Click the Refresh or Reload button in your browser.

The Send or Publish window is only partially displayed.

You have tried to send a document to another user or publish it to the corporate repository, but the Send or Publish page isn't completely displayed.

What you can do

Click the Refresh or Reload button in your browser.

You have received the message, "You cannot export the document as it is in 4.1 format in the repository."

You have tried to send or publish a BUSINESSOBJECTS document from INFOVIEW. A BUSINESSOBJECTS 4.1 document with the same name already exists in the repository. If you did send or publish the current document, you would overwrite the one in the repository. Consequently, BUSINESSOBJECTS 4.1 users would no longer be able to work with the document, because you cannot use BUSINESSOBJECTS 5.1 documents in BUSINESSOBJECTS 4.1.

What you can do

You can overwrite BUSINESSOBJECTS 4.1 documents in the repository by using the Send and Publish features in BUSINESSOBJECTS 5.1. You cannot do this from INFOVIEW.

For information on sending and publishing documents from BUSINESSOBJECTS, refer to "Sending and Publishing BusinessObjects Documents" on page 209.

When you try to open a BusinessObjects document, this message appears, "VBA is not available".

You do not have the correct version of VBA installed on your computer to view this document. One of the following situations may apply:

- The document you are trying to open contains one or more macros.

  If you click OK, the document opens with the macros disabled. If you click Cancel, you will receive another error message, "The file could not be opened."
- The document you are trying to open contains add-ins.
- The document you are trying to open contains a VBA data provider.

What you can do

If you do not need to edit the document you will be able to view it without any problems. If you disable the macros, you will not be able to install and use add-ins, run macros, or refresh or edit the data that uses a VBA data provider.
If your document is built on a universe, you may still be able to refresh and edit the data with the macros disabled.

If you installed BUSINESSOBJECTS through the INFOVIEW portal, you can obtain the correct version of VBA by uninstalling BUSINESSOBJECTS from your computer, and reinstalling it through the portal. The install wizard will ask you if you want to install the BUSINESSOBJECTS version of VBA. Check the box labelled *Download and Install VBA,* and continue with the installation.

If the option to download VBA does not appear, contact your system administrator for assistance.

Part II

Using BusinessObjects Reader

www.businessobjects.com/services/infocenter

Chapter 6 Introduction to BusinessObjects Reader

In this chapter

What Is BusinessObjects Reader?

BUSINESSOBJECTS READER provides access to your business information, by enabling you to view and distribute BUSINESSOBJECTS documents, directly from your desktop.

Can you create or edit documents in BusinessObjects Reader?

You cannot create new documents or edit existing documents using BUSINESSOBJECTS READER. By design, READER lets you view, refresh, save, publish and print documents.

You can create and edit BUSINESSOBJECTS documents using the BUSINESSOBJECTS REPORTER module. You can perform drill-down analysis by using the BUSINESSOBJECTS EXPLORER module. These modules are optional; you or your administrator can install them on top of the BUSINESSOBJECTS READER product.

In summary:

- Whether you have BUSINESSOBJECTS READER, or REPORTER and/or EXPLORER, you can view, refresh, publish and print documents.
- To be able to create and edit BUSINESSOBJECTS documents, you have to install the BUSINESSOBJECTS REPORTER module.
- To be able to perform drill-down analysis, you have to install the BUSINESSOBJECTS EXPLORER module.

All reporting and analysis features are described in the *BusinessObjects User's Guide*.

What can you do with BusinessObjects Reader?

With BUSINESSOBJECTS READER you can make the most of the information you have at hand, by working with documents that are created from the data in your data warehouse, and distributed through the repository, the centralized storage and distribution mechanism that manages universes, user information and document exchange.

BUSINESSOBJECTS READER lets you:

- Retrieve and view BUSINESSOBJECTS documents that other users have sent to you, published to the corporate repository, or scheduled.
- Sort documents in the repository by category, transforming often unwieldy document lists into pertinent subsets of relevant information.
- Send documents to other BUSINESSOBJECTS and INFOVIEW users.

- Publish documents to the corporate repository, where they can be accessed by whole groups of users, from BUSINESSOBJECTS READER or INFOVIEW over the Web.
- Save copies of retrieved documents.
- Refresh documents you've retrieved with the latest data from the database.
- Work with BROADCAST AGENT, which lets you automate the communication of business information throughout your enterprise -- or even further -- by refreshing, printing, and publishing your documents through the BUSINESSOBJECTS repository, or over the World Wide Web.
- Print documents.
- Customize BUSINESSOBJECTS READER with VBA macros and add-ins.

What you cannot do

With BUSINESSOBJECTS READER, you cannot:

- Format documents
- Create new documents, or add data to existing documents.
- Retain the formatting of WEBINTELLIGENCE documents. When you open these in BUSINESSOBJECTS READER, they are automatically formatted with the standard BUSINESSOBJECTS document template.
- Send, publish or schedule WEBINTELLIGENCE documents. Using BUSINESSOBJECTS READER, you can send, publish and schedule BUSINESSOBJECTS documents only.

How do InfoView and BusinessObjects Reader work together?

Both INFOVIEW and BUSINESSOBJECTS READER are your entry points to viewing the business information you need.

- When you log into INFOVIEW in your browser, you get instant access to the document lists that provide an overview of your corporate data capital.
- When you log into BUSINESSOBJECTS, you can make sure you're notified when documents are waiting to be retrieved. Using the Document Exchange toolbar, you can access the list of documents that have been published to the repository and made available to you, sent to you by other users, or distributed to you through BROADCAST AGENT.

What is Document Distribution?

What are you going to do with the business information contained in your BUSINESSOBJECTS documents? In most cases, you need to exchange information with other people in your organization, your business partners, and with the outside world.

One of the key advantages of BUSINESSOBJECTS is its integrated architecture that enables you to communicate business information across your enterprise or organization. BUSINESSOBJECTS lets you publish your information around the globe using the World Wide Web. You can:

- Publish BUSINESSOBJECTS documents through the repository, so that BUSINESSOBJECTS and INFOVIEW users can access the information in those documents.
- View and retrieve documents that other users have published.
- Schedule BUSINESSOBJECTS documents thanks to BROADCAST AGENT, which automates document processing and distribution.
- Publish documents on the World Wide Web and Microsoft channels.
- Print documents.

What's new in document distribution?

If you're updating from a previous version of BUSINESSOBJECTS, use this section to find out what's new in document distribution in this version.

Easier to publish BusinessObjects documents for Web users

BUSINESSOBJECTS repository-based architecture allows you to distribute information across your enterprise. By publishing a BUSINESSOBJECTS document on the repository, you let not only BUSINESSOBJECTS, but also INFOVIEW users view and retrieve the document over the Web. BUSINESSOBJECTS automatically generates the correct format required to view the document in a Web browser.

In BUSINESSOBJECTS, you can also view documents that WEBINTELLIGENCE users have created and published. (For information about limitations on working with WEBINTELLIGENCE documents in BUSINESSOBJECTS, refer to "Restrictions on WebIntelligence and BusinessQuery documents" on page 168 and "Saving WebIntelligence documents" on page 174.)

INFOVIEW users can view BUSINESSOBJECTS documents either in HTML, or in an enhanced format that displays and prints documents as if they were open in BUSINESSOBJECTS (same fonts, page layout etc.) -- and all this over the Web, corporate intranet or extranet.

Finally, BUSINESSOBJECTS and INFOVIEW users can schedule documents with BROADCAST AGENT. When BROADCAST AGENT publishes processed documents to the repository, any BUSINESSOBJECTS or INFOVIEW user with repository access can view the document.

Sending documents to groups of users

You can now send documents not only to individual users but also to user groups, which the supervisor sets up. This allows departments or working teams to share information more easily.

Publishing documents to channels

BUSINESSOBJECTS now supports channels, which let you subscribe to information published over the World Wide Web. The supervisor sets up a channel for each group of users. You then publish a document to this channel using the Publish To>Channels command on the File menu.

You can use this feature if you're using Microsoft Internet Explorer version 4 or higher.

Document Agent Server is now Broadcast Agent

DOCUMENT AGENT SERVER provided scheduled document processing with BUSINESSOBJECTS 4.1.

BROADCAST AGENT is the new name for this product, but the name is not all that has changed. For example, BROADCAST AGENT now lets you perform report bursting, whereby you can automatically refresh a document according to the profile of the users who will receive it. For the full list of the new scheduled processing features, see "What can Broadcast Agent do?" on page 229.

On the server side, BROADCAST AGENT benefits from CORBA's distributed deployment, load balancing and fail-over capabilities. For more technical information about BROADCAST AGENT, see the *Deployment Guide* and the *Broadcast Agent Administrator's Guide.*

Categories

A category is a keyword or phrase you can assign to documents when you publish them to the repository, send them to users or to BROADCAST AGENT. When retrieving documents, you can then filter your searches to find only those documents corresponding to selected categories, no categories, or all categories.

For example, when sending documents, you can assign the “Marketing” category to documents of interest to the Marketing Department. Marketing personnel can then search the repository using this category, and find relevant documents quickly.

Categories pertain to a particular repository. Documents in the repository can be associated with no category, or several, but they have no associated categories if they aren’t stored in the repository.

Finding and retrieving documents from the repository

Another new BUSINESSOBJECTS feature is the Find command on the File menu, which allows you to search the repository for documents. This command opens a dialog box in which you specify search criteria, such as Processed Documents if you want to see documents from BROADCAST AGENT only. Once you’ve limited the number of documents displayed, it’s easier and quicker to pick the ones that interest you.

Document properties

Document properties are an essential feature of the new document search capability. All BUSINESSOBJECTS documents have document properties, including the name of their data provider(s), their specified refresh option, and the date and time they were last refreshed. You can also add document properties such as keywords, comments and document author information, using the Properties command on the File menu.

When you retrieve documents from the repository (Retrieve From commands, File menu), you can use document properties to browse only the documents you need. This feature is especially helpful if your organization publishes large numbers of documents, only some of which are pertinent to you.

Tip: BUSINESSOBJECTS 4.1 documents didn’t have document properties per se. Thus, if you select Retrieve From>Corporate Documents on the File menu, then run a search on documents that have document properties, you will view only those documents that were created in BUSINESSOBJECTS 5.0. For more information about finding documents, see “Using search criteria to find published documents” on page 201.

Document Exchange toolbar

Document publishing with BUSINESSOBJECTS is now even easier, thanks to the new Document Exchange toolbar. The toolbar provides shortcuts to all the Send To, Publish To and Retrieve From commands on the File menu.

See page 162 for an illustration and description of the Document Exchange toolbar.

Characters that you can use in document names

When you save BUSINESSOBJECTS documents, you can use spaces and characters other than A-Z or 0-9. However, spaces and non-alphanumeric characters are not supported in documents that you distribute for viewing over the Web. This restriction applies to documents viewed in HTML, and in the Report Viewer (metafile format).

So, when you send or publish documents to the repository, use only A-Z and 0-9 (ABCDEFGHIJKLMNOPQRSTUVWXYZabcdefghijklmnopqrstuvwxyz0123456 789). Other characters, including spaces, will be replaced by a percentage sign (%), followed by the character's hexadecimal ASCII code, e.g.,

My Document.htm is converted to *My%20Document.htm*.

This restriction also applies to documents that you update from version 4.1.

Maximum number of characters in report tabs for Web distribution

You can use up to 27 characters in the report tabs of documents that you send or publish for viewing over the Web, in INFOVIEW.

Chapter 7 BusinessObjects Reader - The Basics

In this chapter

Overview

This chapter explains some of the basics you need to know to work with BUSINESSOBJECTS READER and then describes the everyday tasks you'll be doing, such as opening documents and reading the reports in them, refreshing reports with updated data from the database, running macros, and saving documents in different formats so that you can use the data in other applications.

Starting BusinessObjects Reader

The way you start BUSINESSOBJECTS depends on how it has been set up in your company. You may be able to start BUSINESSOBJECTS from INFOVIEW via an Internet browser as well as from the Windows Start menu if this has been set up in your company. Your system administrator will give you all the necessary information on how you should start your BUSINESSOBJECTS. Using BUSINESSOBJECTS via INFOVIEW is fully documented in *"Viewing BusinessObjects documents in BusinessObjects" on page 81* of this user's guide. Starting BUSINESSOBJECTS from the Windows start menu is explained below.

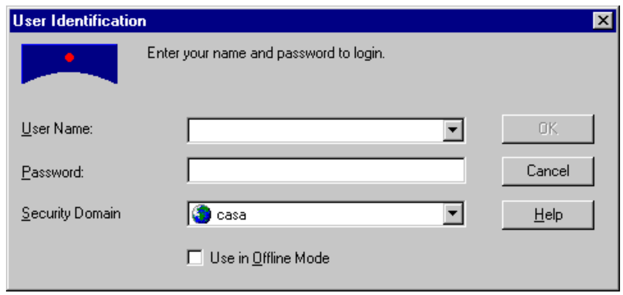
Starting BusinessObjects from the Windows Start menu

The way you log on to BUSINESSOBJECTS depends on the way BUSINESSOBJECTS has been set up in your company. When you start BUSINESSOBJECTS, you may have to enter a user name and password and you may have to choose a security domain.

If this is the case, the user name, password and security domain are assigned by your BUSINESSOBJECTS supervisor or system administrator.

To start BUSINESSOBJECTS:

1. Click the BUSINESSOBJECTS program icon in the BUSINESSOBJECTS group in the Programs menu.
   The User Identification dialog box appears.



2. Enter your user name and password and choose your security domain, if applicable, and click OK.

3. The User Identification box closes and the BUSINESSOBJECTS window opens

Note: In some configurations, the User Identification dialog box does not appear when you start BUSINESSOBJECTS.

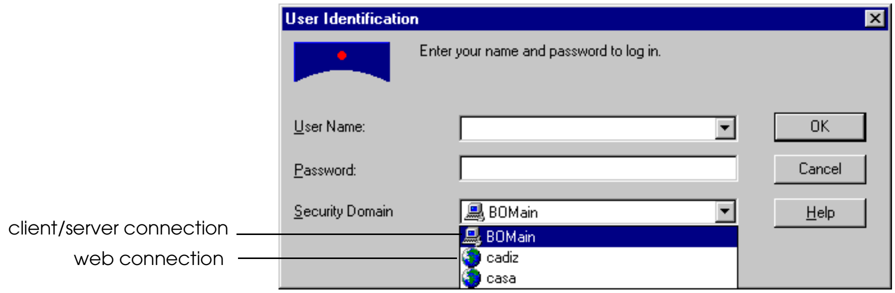
Choosing a security domain

Depending on the way BUSINESSOBJECTS is set up in your company, you may have a choice of security domains. There are two types of security domain connection and the features available to you in BUSINESSOBJECTS may change according to the type of security domain you connect to. Certain menu items may become unavailable or you may not have access to all types of data provider or to the same list of universes.

The type of security domain connection is identified by an icon:

- A connection to a repository via a BUSINESSOBJECTS web connection is identified by a globe icon.

- A connection to a repository via a BUSINESSOBJECTS client/server connection is identified by a computer icon.



Using offline mode

Depending on how BUSINESSOBJECTS has been set up, you may have the option of starting BUSINESSOBJECTS in offline mode. Using BUSINESSOBJECTS in offline mode means that you are not connected to a repository which in turn means that, whatever your connection type, you will not be able to retrieve and send documents using BROADCAST AGENT. However, what you *can* do once you have opened BUSINESSOBJECTS in offline mode depends on the type of connection you chose to use in offline mode.

Client/Server connection

If you are using a BUSINESSOBJECTS client/server connection offline and not connected to a repository, you can still work with documents and universes stored locally on your computer and even refresh documents if you have a connection to the database, and the database connection and security information is stored on your computer.

Web connection

If you are using a web connection offline, you will not be able to retrieve documents from, and send documents to, Personal Document folders on the web server, and will not be able to refresh documents because all the database and connection information is stored on the web server.

In offline mode, you can view and work with documents stored locally.

If BUSINESSOBJECTS cannot establish the connection you requested with the web server, it may give you the option of starting BUSINESSOBJECTS in offline mode if your user rights allow you to work offline.

No remote connection

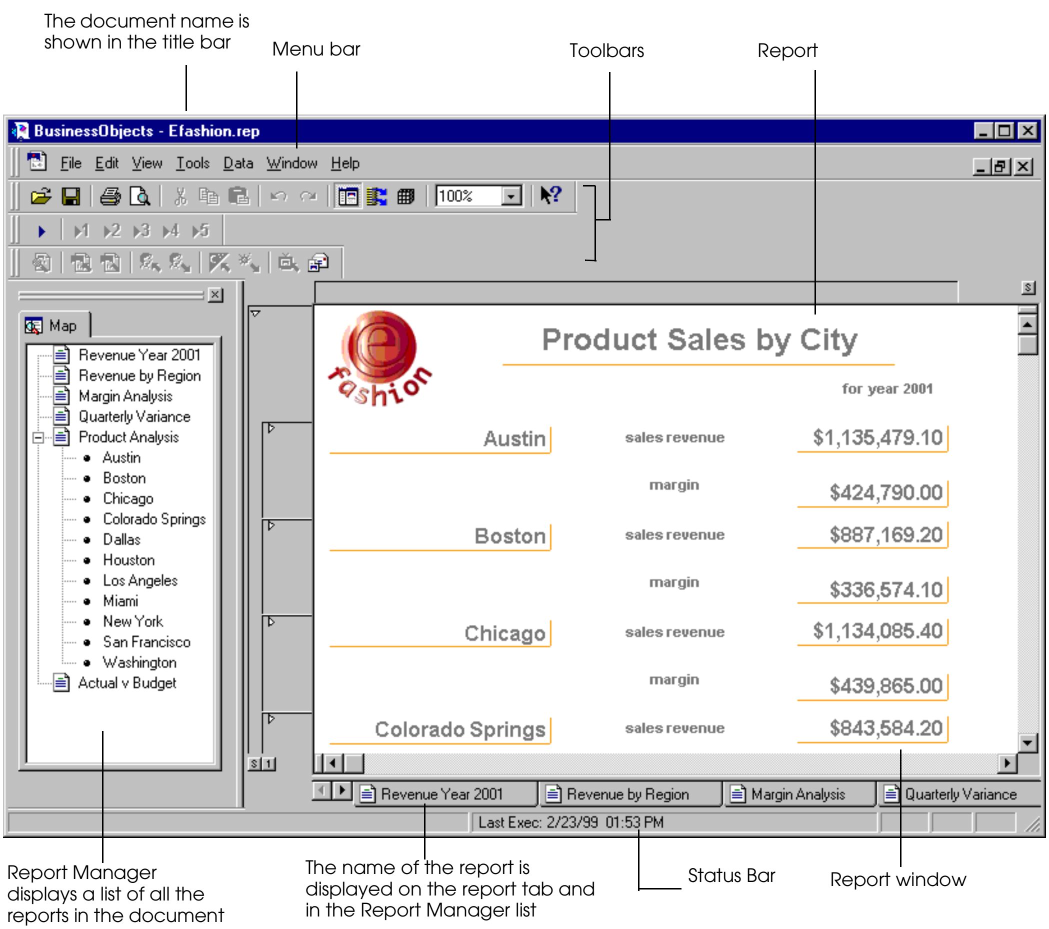
You may also choose to start BUSINESSOBJECTS in offline mode because you know you have no remote connection at all - for example, on a plane - and want to continue to work on documents you have stored locally.

Note: The right to use BUSINESSOBJECTS offline is given to you by your BUSINESSOBJECTS supervisor or system administrator. Depending on how BUSINESSOBJECTS has been set up in your company, you may not even have the option of logging on to BUSINESSOBJECTS in offline mode.

What BusinessObjects Reader Looks Like

The BUSINESSOBJECTS READER workspace is illustrated below. BUSINESSOBJECTS READER has three main parts:

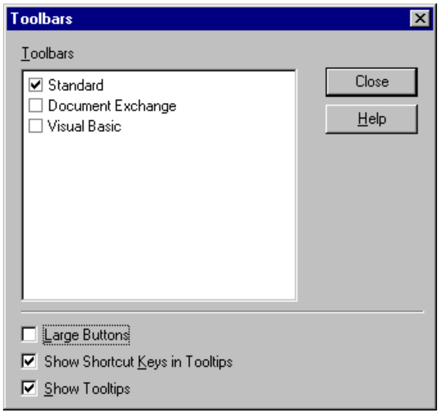
- the menus and toolbars
- the Report Manager window
- the report window



Menus and toolbars

The menus contain all the commands for the tasks you need to carry out in BUSINESSOBJECTS READER. Many of these commands also have buttons on one of the toolbars. You can hide and display the toolbars as needed. To do this:

1. From the View menu, choose Toolbars.
   The list of toolbars is displayed as shown below:



2. Check the ones you want to display and uncheck the ones you want to hide.
3. Click Close to close the toolbar window.

Tip: You can also display and hide toolbars by right-clicking on any toolbar. To display or hide a toolbar, click its name on the menu.

BUSINESSOBJECTS READER has three toolbars:

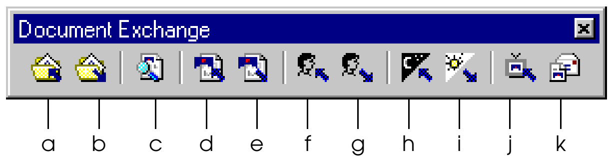
The Standard toolbar

Allows you quick access to standard functions such as open, save, print and refresh:

a. Open (Ctrl + O)
Displays the Open dialog box.
b. Save (Ctrl + S)
Saves any changes you have made in the document.
c. Print
Prints the selected report or reports in the document.
d. Print Preview
Shows you a preview of how your printed pages will look.
e. Report Manager
Hides or displays the Report Manager window.
f. Refresh Data
Connects to the document's data providers and retrieves and displays an update of the data displayed in the document.
g. View Data
Displays the Data Manager dialog box which shows the contents of the data providers contained in the document.
h. Zoom Control
Allows you to enlarge the document window to make it easier to read or reduce the display to view an entire report page.
i. Contextual Help
Opens the contextual online Help. Click this button and then click on the menu item, toolbar button or other part of the BUSINESSOBJECTS workspace you want information on.

The Document Exchange toolbar

Allows you to find and retrieve documents, publish documents and send documents to other users by email or via the BUSINESSOBJECTS repository. Sending, retrieving and publishing documents is dealt with in detail in Chapter 8 "Viewing and Retrieving Published Documents in BusinessObjects" on page 193, Chapter 9 "Sending and Publishing BusinessObjects Documents" on page 209 and Chapter 10 "Scheduling BusinessObjects Documents" on page 227.



a. Send to Personal Documents
Retrieves documents from your personal documents folder on the BUSINESSOBJECTS web server.

b. Retrieve from Personal Documents
Saves documents in your personal documents folder on the BUSINESSOBJECTS web server.

c. Find Documents
Displays the list of published documents, and lets you run a document search based on criteria that you set.

d. Publish To Corporate Documents
Publishes documents to the repository, where other users can view and retrieve them.

e. Retrieve From Corporate Documents
Retrieves published documents from the repository.

f. Send to Users
Sends documents to individual users or user groups.

g. Retrieve From Users
Retrieves documents that other users have sent directly to you.

h. Send To Broadcast Agent
Sends the active document to Broadcast Agent for scheduled processing and distribution.

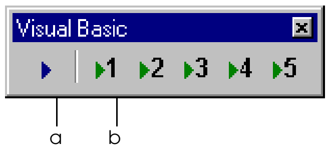
i. Retrieve From Broadcast Agent
Retrieves documents that Broadcast Agent has processed and sent to you.

j. Publish To Channels
Publishes the active document on a channel that the supervisor has set up. Other users can subscribe to this channel and view up-to-date information over the World Wide Web.

k. Send to Mail
Sends the active document by e-mail.

The Visual Basic toolbar

Allows you to assign macros to the five toolbar buttons and then run the macro simply by clicking on the associated button. See "Associating a macro to a toolbar button" on page 190 for an explanation of how to do this.

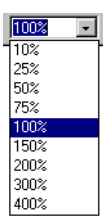


a. Opens the macros dialog box
b. Buttons 1-5 run the macros that have been assigned to them

Choosing the way you view documents

This section describes the options you can set to change the way you view your documents in the report window.

Setting the display size



You can magnify a part of the display in the report window to see it close up, or reduce the display to see more in the report window.

To change the size of the display:

- Click the arrow next to the zoom control box on the Standard toolbar and choose a value from the list.

You can also type a value directly into the zoom control box. You can set values between 10% and 400%.

Using Page Layout view

In Page Layout view, you can see how elements will be positioned on the printed page. You can also see the headers, footers and margins of your report.

To switch Page Layout on and off:

- From the View menu, choose Page Layout.

Viewing a document created in BusinessObjects 4.1

BUSINESSOBJECTS 5.1 uses standard Microsoft fonts. BUSINESSOBJECTS 4.1 used fonts which are slightly different from standard Microsoft fonts.

If you're using documents created in BUSINESSOBJECTS 4.1, you can display and print data in the fonts used in BUSINESSOBJECTS 4.1 so that your documents retain the same look.

To do this:

1. From the Tools menu, choose Options.
   The Options dialog box is displayed.
2. Click the General tab.
3. Check the option *Print as BusinessObjects 4.1*.

Note: When you check or uncheck this option, you may need to minimize and then maximize the BUSINESSOBJECTS READER document window to see the change in the display.

Using Outline view

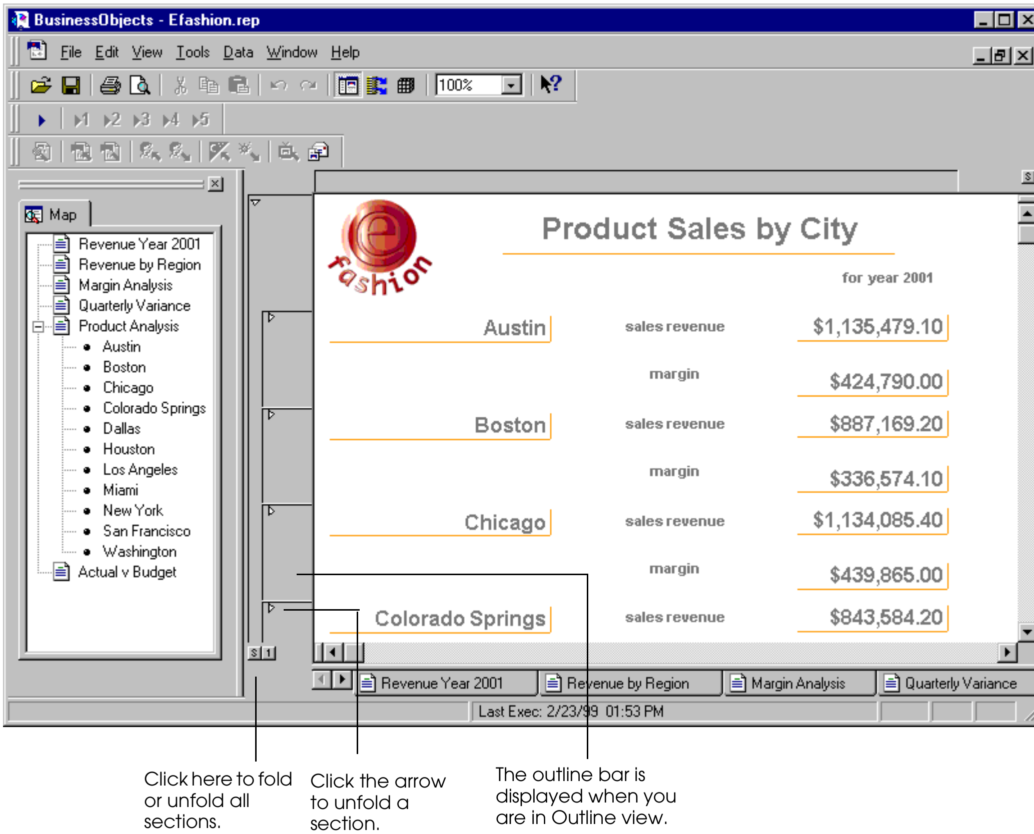
When you have a report in sections with a lot of information in each section, a convenient way of presenting and viewing the report is to use outline view. Outline view folds up the sections in the report to display only the high level information that you've included at the top of each section. You can then open up the sections you are interested in to get more details. The person who created the report may have turned on Outline view to make it easier for you to go directly to the section you are interested in.

To turn outline view on and off:

- From the View menu, choose Outline.

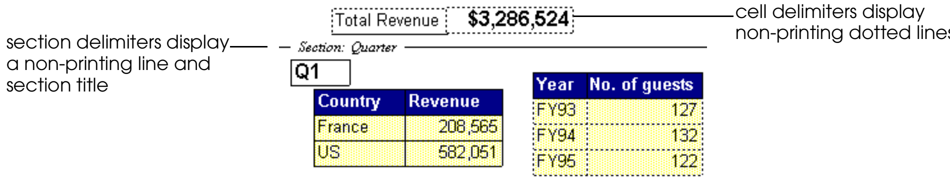
To fold or unfold a section in outline view:

- Click the arrow next to the section name.



Showing delimiters

Delimiters are non-printing lines as illustrated below. There are four types of delimiters that you can turn on and off.



To show or hide delimiters:

- From the View menu:

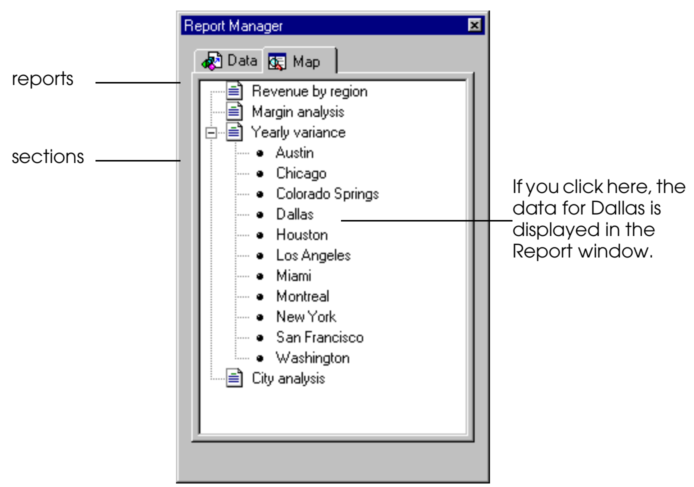
Choose...	To show or hide
Cell Delimiters	the outline of a cell
Page Margins	page margins; you can only turn margin delimiters on if you are in Page Layout view
Section Delimiters	where a section begins and ends
Grid	a page grid

Managing Documents

A BUSINESSOBJECTS document contains reports that present your business data, in tables and charts, for example. A document can contain just one report, or several reports and a report itself can be broken down into sections.

Navigating through documents

BUSINESSOBJECTS READER has the Report Manager to help you manage and navigate through the reports in a document. The Report Manager displays a list of all the reports in the document. When you click on a report in the list, the selected report is displayed in the Report window. If the report contains sections, the section names are also displayed and when you click on a section name, the selected section is displayed in the Report window. This allows you to go quickly and easily to the part of the document that interests you.




Report Manager

You can show or hide the Report Manager by clicking the Report Manager button on the Standard toolbar.

Tip: When the Report Manager window opens, it is docked on the left-hand side of your report window. You can undock the Report Manager window and drag it to any other convenient location on your screen. Hold down the Ctrl key while moving the Report Manager window to prevent it from docking

Report Tab

You can also switch from one report to another by clicking the tab of the report you want to display.

Opening documents

In this version of BusinessObjects, you can open:

- All documents created in BusinessObjects 4.1
- BusinessQuery documents
- WebIntelligence documents.

Restrictions on WebIntelligence and BusinessQuery documents

WebIntelligence and BusinessQuery documents that you open in BusinessObjects appear with the standard BusinessObjects document template. Formatting applied in WebIntelligence and BusinessQuery is lost.

Opening a document


Open

1. Click the Open button on the Standard toolbar.
   The Open dialog box appears.
2. Choose the type of document you want to open from the *Files of type* list.
3. Locate the document you want to open and click OK.

Tip: BusinessObjects keeps track of the last documents opened. These are listed at the end of the File menu. Just choose the document you want to open from the list.

Opening several documents at once

Opening several documents at once is useful if you have complex documents that take a long time to open. You can select all the documents you want to use and then get on with another task while you are waiting for them all to open.

To do this:

Open

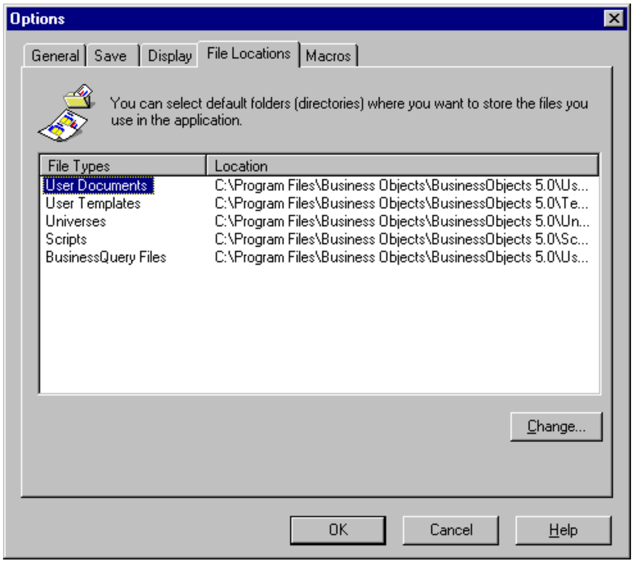
1. Click the Open button on the Standard toolbar.
2. The Open dialog box appears.
3. Choose the type of document you want to open from the *Files of type* list.
4. Select the documents you want to open using the Shift key to select adjacent documents and the Ctrl key to select non adjacent documents and click OK.

Changing default file locations

When you choose Open, the Open Folder dialog box opens by default in the UserDocs folder in the BUSINESSOBJECTS folder. You can change this setting if you keep your documents in a different location.

To do this:

1. From the Tools menu, choose Options.
   The Options dialog box opens.
2. Click the File Locations tab.
3. Click on the file type in the list and click the Change button.
   The Browse for Folder dialog box opens.
4. Locate and open the folder you want to set as the default and click OK.
   The new folder and path is displayed in the list.



Saving documents

When you have refreshed a document with new, updated data, you need to save the changes to your document. BUSINESSOBJECTS READER also allows you to save your document in different formats so that you can use the data in other applications. This section describes how to do this.

Saving a document


Save

- Click the Save button on the Standard toolbar, or choose Save from the File menu.

Saving a document for all users

If you want to make a document accessible to another user working without a repository, use the Save As command in the File menu, then check the *Save for all users* option in the Save as dialog box.

If you do not do this, users working without a repository will get an error message saying "You are not authorized to use this document" when they try to open your document. This is important to bear in mind if you are sending documents to other users via email, for example.

Saving a document in text or rich text format

When you save a BUSINESSOBJECTS document in text (.txt) or rich text format (.rtf), only the currently selected report is saved. Graphics are not saved in rich text format and text documents. To save a document in text or .rtf format:

1. From the File menu, chooses Save As.
   The Save As dialog box appears.
2. In the *Save as type* list box, click:
   - *"Text file (*.txt)"*, or
   - *"Rich text format (*.rtf)"*.
3. Click Save.
   BUSINESSOBJECTS makes a copy of the document and saves it in the specified format. The original document remains on your screen.

Saving a document in HTML format

You can save a BUSINESSOBJECTS READER document in HTML format. To do this:

1. From the File menu, choose Save As HTML.
   The Save As dialog box opens.
2. Choose the location where you want to save the file and click Save.

3. The HTML options dialog box opens where you can specify how you want your HTML document to be saved. For a full description of the options available on this dialog box and for advice on preparing HTML documents in general, see “Setting HTML Options” on page 223.

Saving a document as a BusinessQuery file

BUSINESSQUERY for Excel users build queries on universes in Microsoft Excel. By saving a document as a BUSINESSQUERY file, you can transfer data obtained in BUSINESSOBJECTS to BUSINESSQUERY. Then, you can work with the query using the functionality of both BUSINESSQUERY and Microsoft Excel.

Saving a document as a BUSINESSQUERY file is only possible if all the following conditions are satisfied:

- The current document contains only one data provider.
- The data provider is a query on a universe.
- The query returns only one microcube.

To save a document as a BUSINESSQUERY file:

1. Select the Save As command on the File menu.
2. Move to the folder in which you want to save the document. Note that the default folder for BUSINESSQUERY files is `C:\BusinessObjects\UserBQY\UniverseName`, where `UniverseName` corresponds to the universe on which the query was built.
3. Select *BusinessQuery files (*.bqy)* in the *Save as type* box.
4. If you wish, type a different name in the *File name* box, then click OK. Otherwise, simply click OK.

Note: For information on working with the query in BUSINESSQUERY, refer to the *BusinessQuery User’s Guide*.

If you have opened a BUSINESSQUERY document in BUSINESSOBJECTS, you can save it as a BUSINESSQUERY document or as a BUSINESSOBJECTS document.

When you click Save, BUSINESSOBJECTS prompts you to save the document as a BUSINESSOBJECTS document. To save the document in BUSINESSQUERY format, refer to “Saving a document as a BusinessQuery file” on page 172.

Whether you save the document in BUSINESSQUERY or BUSINESSOBJECTS format, you will be able to continue to work with it in both applications.

Saving a document in PDF format

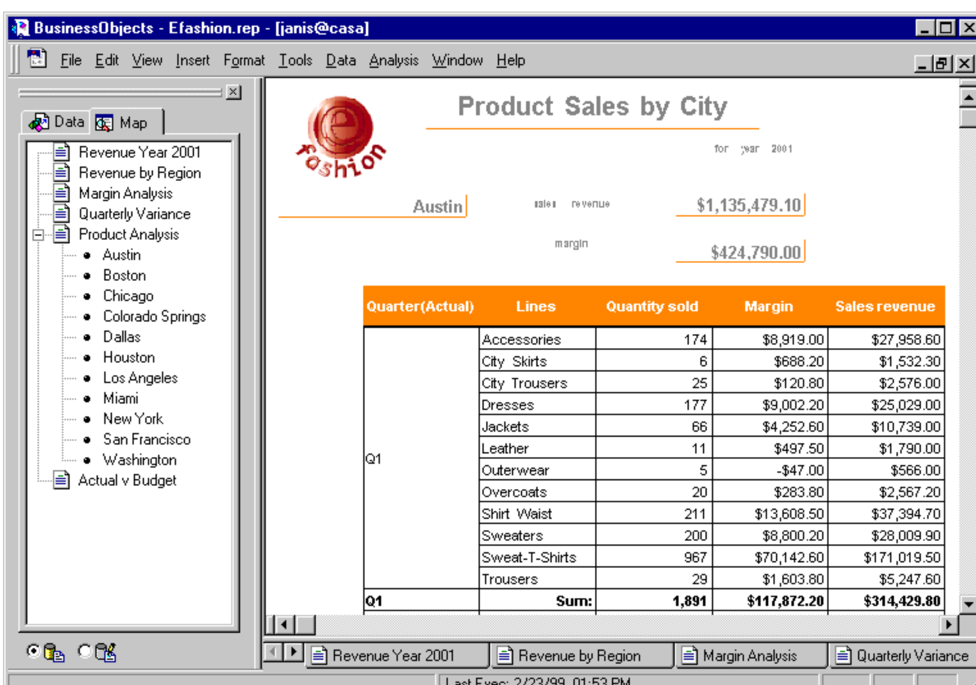
BUSINESSOBJECTS 5.1 allows you to save BUSINESSOBJECTS documents in Adobe Portable Document Format (PDF). All users need to view and print PDF documents is the free Adobe Acrobat Reader. When you open a BUSINESSOBJECTS document saved in PDF format, you can view and navigate through different reports and obtain high quality printed copies. You cannot edit or analyze the data. To save a BUSINESSOBJECTS document in PDF format:

1. From the File menu, choose Save As.
   The Save As dialog box appears.

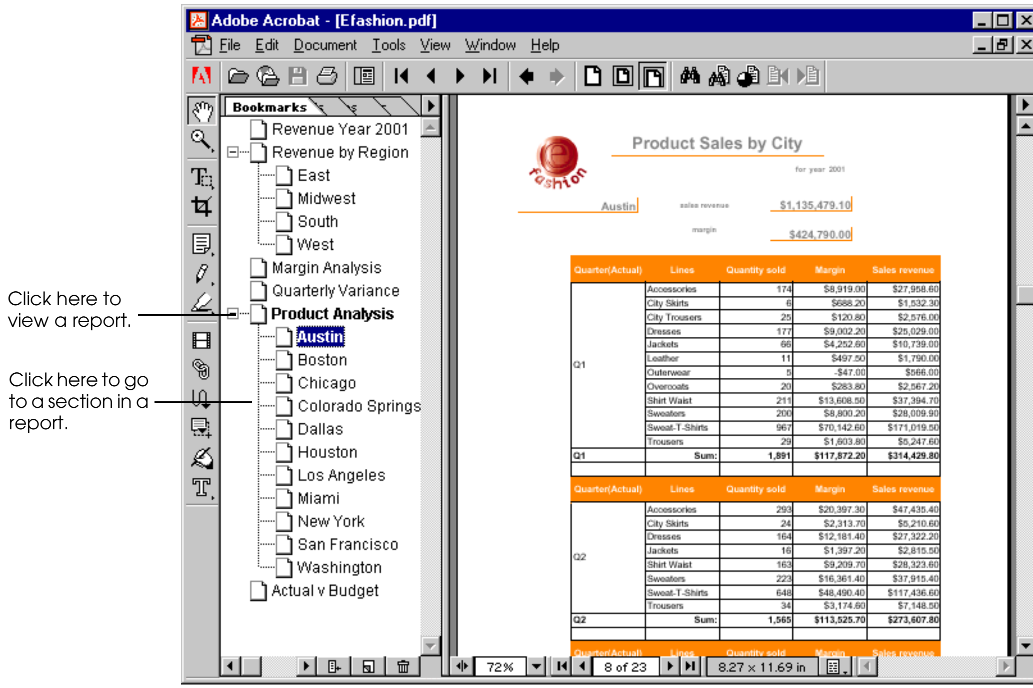
2. In the *Save as type* list box, choose *Portable Document Format(*.pdf)*

3. Click Save.
   BUSINESSOBJECTS makes a copy of the document and saves it in PDF format. The original document remains on your screen.BUSINESSOBJECTS makes a copy of the document and saves it in PDF format. The original document remains on your screen. The illustrations below show the same document in its original BUSINESSOBJECTS format and after saving in PDF format.

Original BusinessObjects document



Note how the navigation outline is retained in the pdf document making it easy to navigate quickly through reports and report sections.



Saving WebIntelligence documents

If you have opened a WEBINTELLIGENCE document in BUSINESSOBJECTS, you cannot save it as a WEBINTELLIGENCE document. You can only save it as a BUSINESSOBJECTS document, i.e., a .rep file.

Once you have saved the document, you can send, publish and schedule the document, but only as a BUSINESSOBJECTS document, not as a WEBINTELLIGENCE document. If you want to send, publish and schedule the document as a WEBINTELLIGENCE document, you must use INFOVIEW in your Web browser, as described in part 1 of this guide.

Copying and pasting data into another application

You can copy data from a BUSINESSOBJECTS document and paste it into a Microsoft Office application such as Excel or Word. You can paste data either as images, for presentation purposes, for example; or as text so that you can work on the data further in the target application. The table below summarizes how you can copy and paste different types of report components:

If you copy a report with....	You can...
Tables, crosstabs and cells	Paste the data in them as an image or as text
Charts and images	Paste them as images

Example

Copying data from BUSINESSOBJECTS to Microsoft Excel

The following example shows how to copy data from BUSINESSOBJECTS to Excel:

1. From the Edit menu, choose Copy All.
   BUSINESSOBJECTS copies the contents of the currently active report to the clipboard.
2. Open the Microsoft Excel workbook where you want to paste your data.
3. From the Edit menu, choose Paste Special.
4. Choose how you want to paste the data.

Choose...	To....
Text	Copy the clipboard contents as data that you can then work on in the target application.
Picture	Copy the clipboard contents as a Picture image. For example, a BUSINESSOBJECTS table is copied as an image and you will not be able to work on the data in the target application. This is the recommended format for pasting images.
Bitmap	Copy the clipboard contents as a Bitmap image. If you choose to paste a Bitmap image, bear in mind that this format can take up a lot of memory and disk space.

The data is pasted into the Excel workbook.

Using Personal Document folders

The Personal Documents folder is reserved storage space on the BUSINESSOBJECTS web server where you can save documents for your personal use. Only you can use this folder. You will only have access to Personal Documents if you connect to BUSINESSOBJECTS via a web connection.

To help you organize and find your documents more easily, you can use categories. The categories you use here are personal categories and you are the only person who can create, delete and modify them.

You can view the documents saved in Personal Documents list either from BUSINESSOBJECTS or from INFOVIEW.

Note: For information on viewing personal document lists in INFOVIEW, see "The Personal Documents Page" on page 45 of this *InfoView User's Guide*.

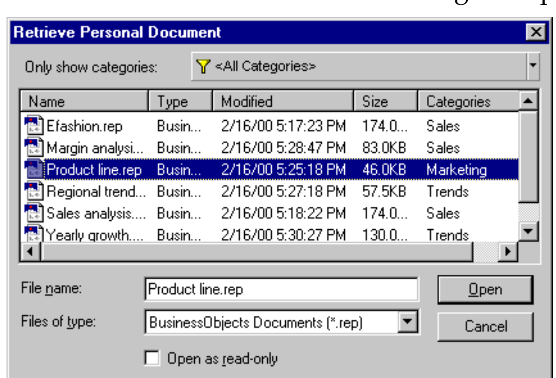
Retrieving a personal document

Retrieve form Personal Documents

If you are connected to a BUSINESSOBJECTS web connection, you can retrieve documents you have saved in your personal documents folder on the web server.

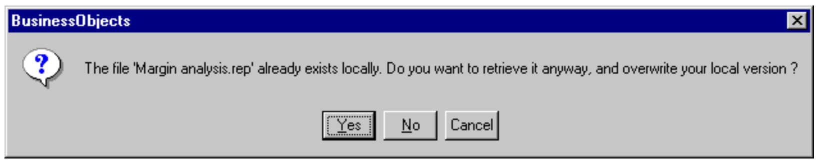
To retrieve a document saved in your personal documents folder:

1. From the File menu, choose Retrieve From/Personal Documents.
   The Retrieve Personal Document dialog box opens.



2. Select the file you want to open from the list and click Open.
   You can only retrieve one file at a time.
   A copy of the document is downloaded to your computer and opened.

Note: When you open a BusinessObjects document from Personal Documents, BusinessObjects copies the document locally. If you work on this document, save it in Personal Documents and then retrieve the same document during a different work session, BusinessObjects displays an error message to tell you that you already have a document with the same name on your computer.



If you know that you saved the latest copy of this document in Personal Documents, you can quite safely overwrite the local copy.

Using categories to find personal documents

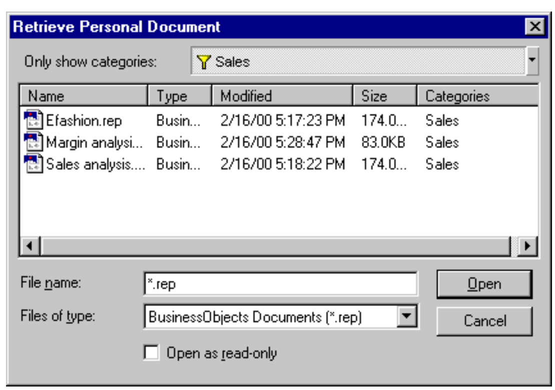
Documents can be assigned to filtering mechanisms called categories. Categories help you sort and find documents in your personal documents list by filtering the list to display only documents belonging to the selected category.

To filter the document list by category:

1. Click the arrow to the right of the All Categories button.
   The Categories box opens. If you haven't created any categories, this list has one entry only, <No Category>.

2. Select one or more categories from the list.
Use the Shift and Control keys to make multiple selections. If you select <No Category>, BUSINESSOBJECTS filters the personal document list to display those documents to which no category has been assigned.

3. Click OK.
The list is filtered to display only the documents assigned to the selected category or categories.



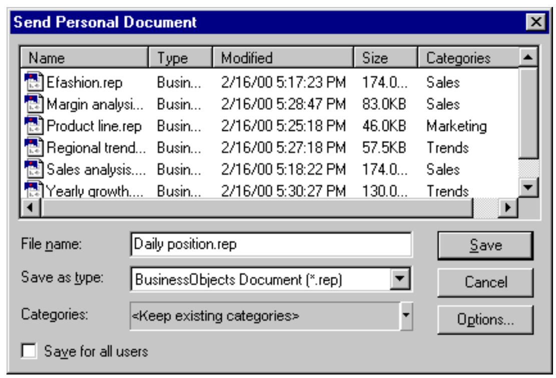
Saving a document in your Personal Documents folder

Send to Personal Documents

You can send a document to your personal documents folder if you are connected to a BUSINESSOBJECTS web connection.

To save a document in your personal documents folder:

1. From the File menu, choose Send to/Personal Documents.
   The Send Personal Document dialog box opens.



2. Type a name for the document in the “File name” box.

3. In the *Save as type* list box, choose the format. Choices are:
   - BusinessObjects Documents (*.rep),
   - Portable Document Format (*.pdf),
   - Rich Text Format (*.rtf),
   - Text Files (*.txt),
   - BusinessObjects Templates (*.ret),
   - BusinessQuery Files (*.bqy).
   - BusinessObjects Add-ins (*.rea)

4. Assign a category to the document if you wish.

5. Click Save.
   The document is saved in your personal documents folder on the web server.

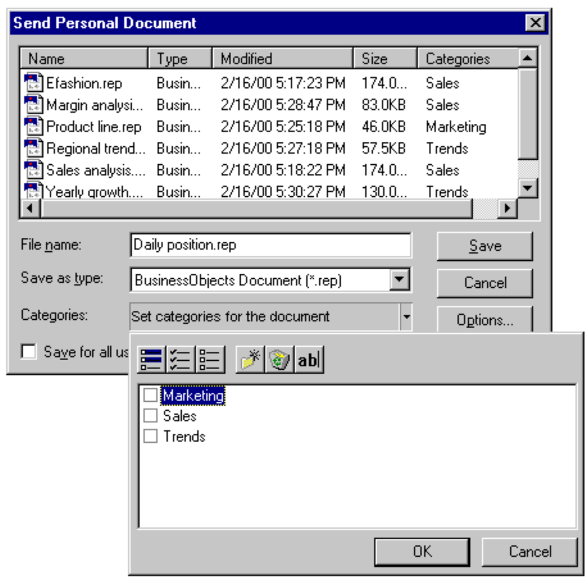
Deleting documents from your Personal Documents folder

If you want to delete documents from Personal Documents, you have to use the personal document list in INFOVIEW. For information on viewing the personal document list in INFOVIEW and deleting documents from it, see “Deleting Documents” on page 118 of this *InfoView User’s Guide*.

Assigning categories to a document

You assign categories to a document when you save it. When you are save a document to which you've already assigned categories, BUSINESSOBJECTS displays <Keep existing categories> in the Categories box and saves the document with these categories unless you make any changes. To assign a category:

1. Click the arrow to the right of the Categories box.
The Categories box opens.



2. Check the categories you want to assign to the document and uncheck any you wish to remove and click OK.
The selected categories are displayed in the Categories box.

3. Click Save to save the document with the assigned categories.

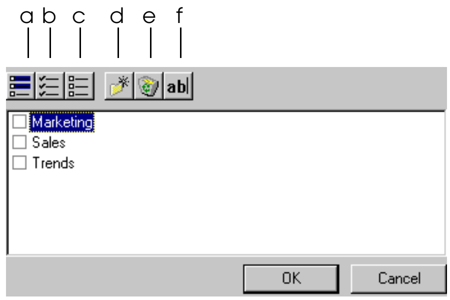
Creating a new personal category

You manage the categories assigned to your personal documents. You can created, delete and rename categories according to your personal needs. To create a new category:

1. Click the arrow to the right of the Categories box.
The Categories box opens.

2. Click the Add Category button.

Add Category



a Displays only the selected category

b Check all categories

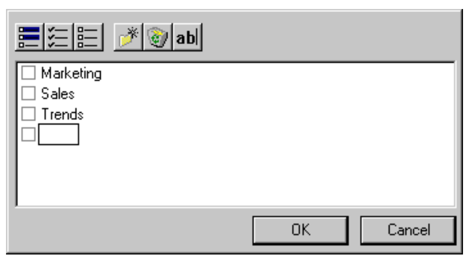
c Uncheck all categories

d Add new category

e Delete the selected category

f Rename the selected category

3. Type in the name for the category in the newly created box.



Renaming a personal category

Select the category you want to rename.

Rename Category

1. Click the Rename button.
2. Type in the modifications.

Deleting a personal category

Delete Category

1. Select the category you want to delete.
2. Click the Delete button.

Refreshing BusinessObjects Documents

A document generated at a given point in time reflects the data as it existed at that time, but it may be inaccurate now. In BUSINESSOBJECTS, you can update the data in a document while keeping the same presentation and formatting. When you update a document, BUSINESSOBJECTS reconnects to the database or file, and retrieves the updated data. This is called *refreshing* a document.

Refreshing a document ensures that the data is kept up-to-date with changes in the database or personal data file.

Different ways of refreshing a document

BUSINESSOBJECTS allows you to refresh documents in the following ways:

- Manually
- Automatically at specific times or intervals
- By sending the document to BROADCAST AGENT, the BUSINESSOBJECTS product that manages the scheduled processing of documents
- Every time you open a document.

Before refreshing documents

When you refresh a document, you refresh the data provider(s) contained in the document. The data provider is the data source; this can be a database query or a personal data file, for example. A document may contain just one data provider, or many data providers, from the same or from different sources.

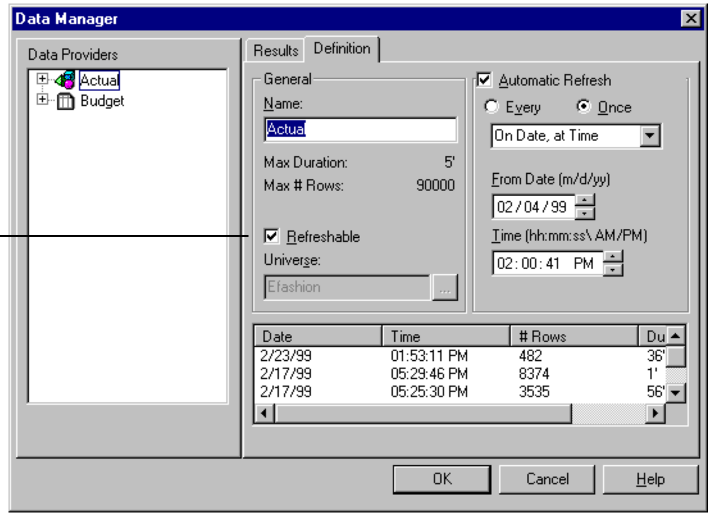
Note: For information on linking data providers using the Link To button, see the *BusinessObjects User's Guide*.

The user who created a document can specify whether or not the document's data provider(s) can be refreshed. Before trying to refresh a data provider, check that the Refreshable option has been set.

To do this:

1. From the Data menu, choose View Data.
   The Data Manager dialog box opens.

Make sure this option is checked.



2. Click the Definition tab.
3. In Data Providers box, select the data provider you want to check on and make sure the Refreshable option is checked.
   If this option is not checked, you cannot refresh the selected data provider. Only the creator of the document or your BUSINESSOBJECTS supervisor can change this setting.

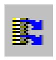
Before refreshing data providers, you should also check that:

- The most up-to-date data is the data you want.
- Refreshing the data provider will not block the server (database).
- Refreshing the data provider will not block your computer.

Some databases support asynchronous mode, which enables you to refresh a data provider without blocking your computer. If the database at your site does not support asynchronous mode, you can avoid blocking your computer by specifying off-peak times for refreshing data providers.

Your IS department, the universe designer and/or the supervisor should be able to advise you on these points.

Manually refreshing a document



Refresh

To update the data in a document:

- Click the Refresh button on the toolbar.

BUSINESSOBJECTS refreshes all the data providers in your document.

Refreshing a document with more than one data provider

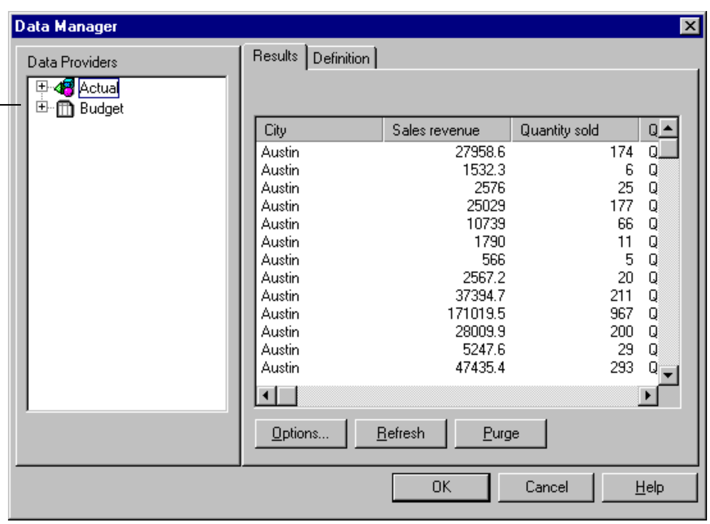
If your document contains more than one data provider, you can choose which data provider you want to refresh. For example, you may have a document that contains data from a database and data from a personal data file and you only want to refresh the data from the database.

To do this:

1. From the Data menu, choose View Data.
   The Data Manager dialog box opens.

2. Click the Results tab.

This is the list of data providers contained in the document.



3. Select the data provider you want to refresh in the Data Providers list.

4. Click the Refresh button.

Refreshing a document with a prompt

When you refresh a document with a prompt, you are asked to choose which data you want to display in your document, before the document can be refreshed. This allows you to focus your analysis on a specified data set, a particular year or a particular product line, for example. If a document has been set up with a prompt, BUSINESSOBJECTS shows a dialog box when you click the Refresh button. The way a prompt dialog looks depends on how the person who created the document set it up.

In the example below, the custom prompt dialog box asks you to choose a product line before refreshing the document.

Automatically refreshing a document

There are a number of options you can set to refresh your documents on a regular basis or at a set time.

Automatically refresh data providers on opening a document

You can set BUSINESSOBJECTS to automatically refresh all data providers in a document each time you open it. To do this:

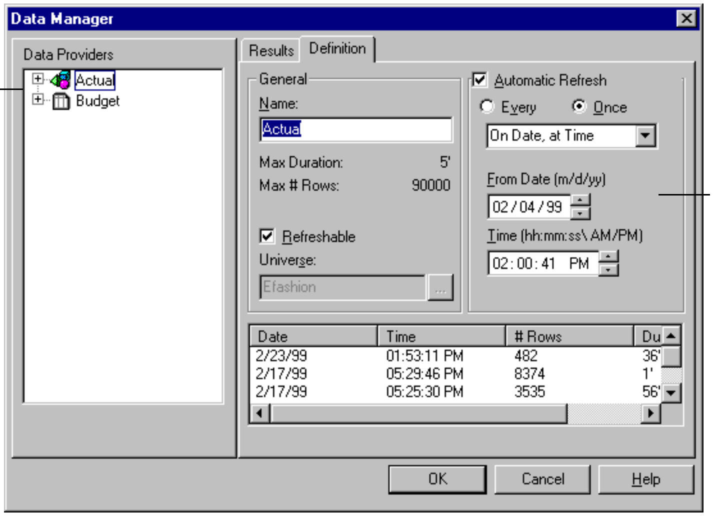
1. Make sure the document is open.
2. From the Tools menu, choose Options.
   The Options dialog box opens up.
3. Click the Save tab.
4. Check *Refresh Document When Opening*, then click OK.

Refresh a data provider once at a set time

If you know the database is to be updated at a certain time on a given date, you can specify that your data provider(s) be automatically refreshed at this point in time. To do this:

1. From the Data menu, choose View Data.
   The Data Manager dialog box opens.
2. Click the Definition tab.

Select the data provider from this list



Set automatic refresh options here

3. In Data Providers box, select the data provider you want to work on.
4. Check Automatic Refresh then Once.
5. Select an option from the list box:
   - *On date, at time*
     Use this option to refresh the data provider at a given time on a given day.
   - *On date, from time*
     Use this option to refresh the data provider after a given time on a set day.
6. Select a date and a time from the respective list boxes, then click OK.

Regularly refresh a data provider

If you know the database is updated every day at a certain time, for example, midnight, you can specify that your data provider(s) be automatically refreshed at 1a.m. every day.

To do this:

1. Follow Step 1 to Step 3 in the procedure “Refresh a data provider once at a set time” on page 186.
2. Check *Automatic Refresh*, then *Every*.
3. Set the intervals at which you want to refresh the data provider by entering a value in the box, and selecting Hour(s) or Minute(s) from the list box.
4. Select the start date and time in the From Date and Time boxes, then click OK.

Setting options before refreshing a query

If the data provider you want to refresh is a query on a BUSINESSOBJECTS universe, you can set options that enable you to:

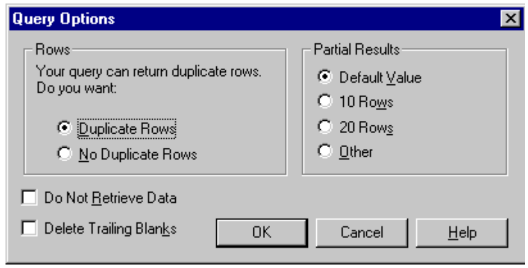
- Specify the number of rows of data that you want the query to return. The *Default Value* option corresponds to the maximum number of rows that the universe designer specified for queries on the current universe.
- Eliminate duplicate rows of data. This feature is useful if you think that the query will return many rows containing the same data.
- Delete trailing blanks. Trailing blanks are spaces that appear at the end of rows of data. They can occur, for example, if the database has been set up with a fixed number of characters per row. This option ensures that trailing blanks do not appear in the query result.

To set query options, then refresh a document:

1. From the View menu, choose Data Manager.
   The Data Manager dialog box opens.
2. Click the Results tab.
3. Select the query you want to refresh in the Data Providers list.
   A query on a BUSINESSOBJECTS universe is identified by the query icon in the Data Providers list.

This icon shows that the data provider source is a BusinessObjects query

4. Click the Options button.
   The Query Options dialog box appears.



5. Click *No Duplicate Rows* if you want to eliminate duplicate rows of data from the query result.
6. To obtain a partial result, you can:
   - Click 10 rows or 20 rows.
   - Enter a number of rows in the Other field. You can use the arrows to raise or lower the value.
7. Click OK to return to the Data Manager.
8. Click the Refresh button.

Emptying data from a document

You can empty the data from a document to make it smaller so it's easier to send to other users, for example. This is called *purging*. Purging the data provider keeps its components (the objects, conditions and sorts, for example), but deletes the data retrieved. You can refresh the data provider at any time when you want to retrieve the results again.

To purge a data provider:

1. From the View menu, choose Data Manager.
   The Data Manager dialog box opens.
2. Click the Results tab.
3. Select the data provider you want to purge.
4. Click the Purge button.

Using Add-Ins and Macros

Add-ins are programs that add optional commands and features to BUSINESSOBJECTS. Add-ins have the *.rea* extension to the file name.

Macros are used to automate tasks that you need to perform frequently. A macro is a series of commands and functions that are stored in a Visual Basic module and can be run whenever you need to perform a task. Macros are created and stored inside BUSINESSOBJECTS documents (*.rep* files) or BUSINESSOBJECTS add-ins (*.rea* files).

You can send and retrieve add-ins (.rea files) in the same way you can send and retrieve BUSINESSOBJECTS documents.

This section explains how to install and run macros and add-ins.

Note: Depending on how BUSINESSOBJECTS has been set up in your company, you may not have access to the menus and toolbars described in this section.

Running a macro

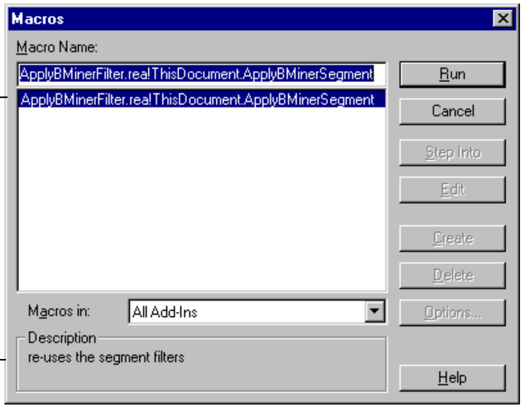
You can run macros either from the Macros dialog box or from the Visual Basic toolbar if macros have been assigned to the macro buttons.

To run a macro from the Macros dialog box:

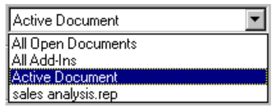
1. From the Tools menu, choose Macro.
The Macros dialog box opens.

This is the name of the macro

The person who created the macro may include here an explanation of what the macro does.



2. From the *Macros in:* list box, choose the documents where the macros are stored. You can display the macros available in the active document, all macros in all open documents, macros in a selected open document or macros in add-ins.



The macros stored in the selected document(s) are displayed in the Macro Name list.

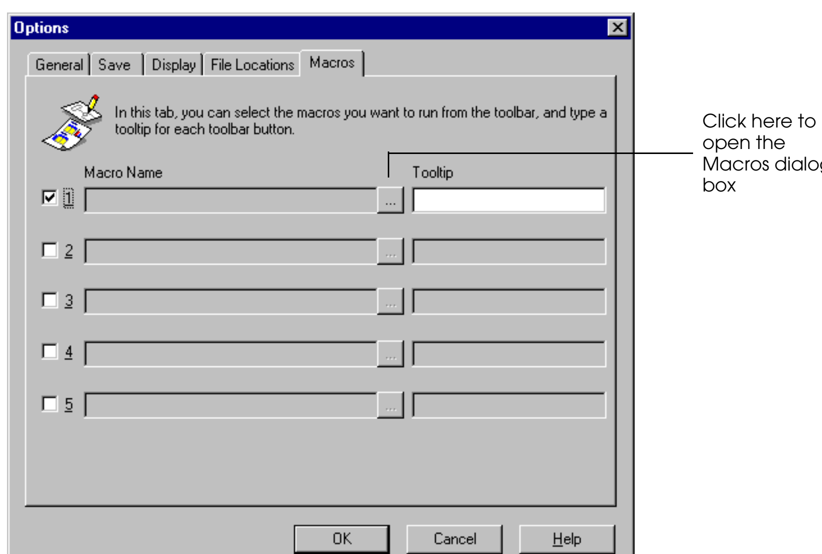
3. Select the name of the macro you want to use and click Run.

Associating a macro to a toolbar button

You can also run macros from the Visual Basic toolbar by assigning a macro to a toolbar button. To associate a macro to a toolbar button:

1. From the Tools menu, choose Options.
   The Options dialog box opens.

2. Click the Macro tab.



3. Click check box 1 to activate the first button on the Visual Basic toolbar.

4. Click the button to the right of the Macro Name box.
   The Macros dialog box opens.
5. Click on the macro you want to use from the list and click the Select button.
   The name of the macro is displayed in the Macro Name box.
6. In the Tooltip box, type the tooltip that you want to use for the macro.
   The tooltip appears when you rest the cursor over the button on the Visual Basic toolbar.
7. Click OK.
   You can now run the macro by clicking the toolbar button.

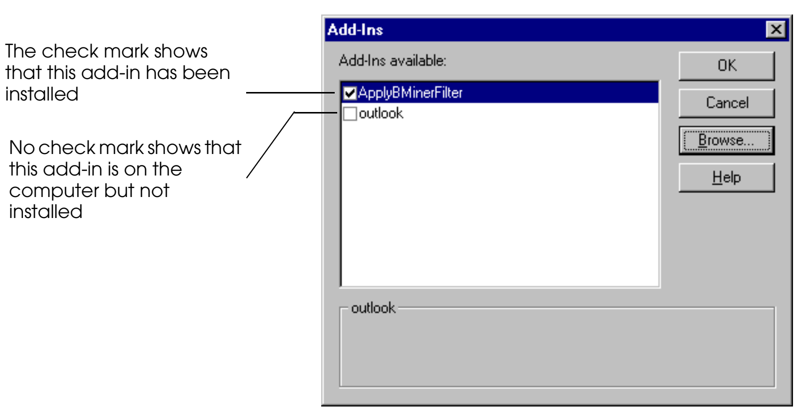
Installing an add-in

Before you can use an add-in, you must install it on your computer and then load it in BUSINESSOBJECTS. Add-ins (*.rea files) are installed by default in the UserDocs folder in the BUSINESSOBJECTS folder. Loading an add-in makes the feature available in BUSINESSOBJECTS and adds any associated commands to the appropriate menus.

Unloading an add-in removes its features and commands from BUSINESSOBJECTS, but the add-in program remains on your computer so you can easily load it again.

To install an add-in:

1. From the Tools menu, choose Add-Ins.
   The Add-Ins dialog box opens.



2. Click the Browse button to locate and open the add-ins on your computer.
   The Add-Ins Available box displays the list of available add-ins. There are two types of add-ins that you may see in this dialog box: those that are available and those that have been installed. You cannot use an add-in until it has been installed.

3. Click the check box next to the name of the add-in and click OK.
   The add-in is installed and can now be used.

Note: When a user installs an add-in, it is only installed for that user. If that user logs on under a different name, the add-in will not be available.

Running an add-in

You can run an installed add-in from the Macros dialog box, or you can associate it with a button on the Visual Basic toolbar.

Uninstalling an add-in

1. Click the check box next to the add-in name in the Add-Ins dialog box to remove the check mark

2. Click OK.
   The add-in features and commands are removed from BUSINESSOBJECTS, but the add-in program remains on your computer so you can easily load it again if you want to use it.

Chapter 8 Viewing and Retrieving Published Documents in BusinessObjects

In this chapter

Overview

BUSINESSOBJECTS and INFOVIEW users share information by publishing and sending documents. These documents contain the information you need to make decisions about your business. They are available on the repository, the BUSINESSOBJECTS central information storage mechanism.

You gain access to this information by viewing and retrieving the documents that other users have sent or published. You view the list of documents on the repository by using the Retrieve From commands in BUSINESSOBJECTS (File menu), then open and/or save the documents that you need. So, retrieving documents means copying them from the repository to your computer.

The same workflow applies for BROADCAST AGENT: when other users publish information by scheduling documents with BROADCAST AGENT, you access that information by retrieving the documents from the repository.

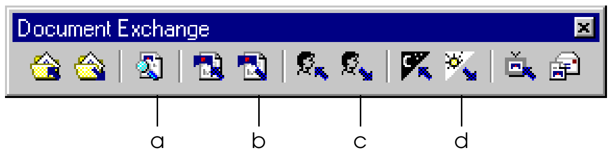
Once you have retrieved documents, you can refresh, print and save them in BUSINESSOBJECTS. If you have installed BUSINESSOBJECTS REPORTER on your computer, you can also reformat documents to make the information they contain as immediate accessible to you as possible.

You can also retrieve:

- WEBINTELLIGENCE documents
- BUSINESSOBJECTS templates
- BUSINESSQUERY files
- BUSINESSOBJECTS add-ins
- Scripts (.sbx and .spt files) from BUSINESSOBJECTS 4.1

Retrieving Published Documents

Retrieving documents in BUSINESSOBJECTS is simple. Start by clicking the Toolbars command on the View menu to display the Document Exchange toolbar.



a. **Find Documents**
Displays the list of published documents, and lets you run a document search based on criteria that you set.

b. **Retrieve From Corporate Documents**
Retrieves published documents from the repository.

c. **Retrieve From Users**
Retrieves documents that other users have sent to you.

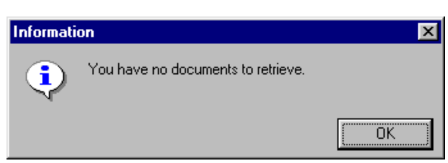
d. **Retrieve From Broadcast Agent**
Retrieves documents that Broadcast Agent has processed and sent to you.

Which toolbar button should you use?

Retrieve from Broadcast Agent

If you've received notification that you have documents to retrieve from BROADCAST AGENT, click the Retrieve from Broadcast Agent button. If you want to check for published corporate documents, click Retrieve from Corporate Documents, and so on.

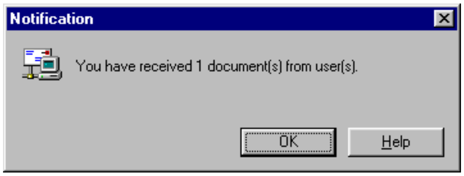
If you get the following message when you click one of the Retrieve from toolbar buttons, you have no documents *of the type you chose* to retrieve.



For example, if you click the Retrieve from Broadcast Agent button but have received no documents from BROADCAST AGENT, this message appears. This doesn't necessarily mean that you have no other documents from other users, or published corporate documents to retrieve.

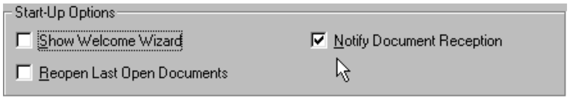
How do you know when you have documents to retrieve?

You can set an option that displays a notification message when you start BUSINESSOBJECTS.



To set BUSINESSOBJECTS to display a notification message on start-up:

1. Select the Options command on the Tools menu.
   The Options dialog box appears.
2. Click the General tab.
3. Check *Notify Document Reception*.



4. Click OK.

From now on, if you have documents to retrieve when you start BUSINESSOBJECTS, the Notification dialog box appears.

Note: This notification message does not appear when you connect to BUSINESSOBJECTS using a web connection.

Note: The Notification dialog box specifies whether you've received documents from users or from BROADCAST AGENT.

BUSINESSOBJECTS does not notify you, however, when users have published documents to the repository using the Publish To>Corporate Documents command.

Not sure where to start? Try the Find button

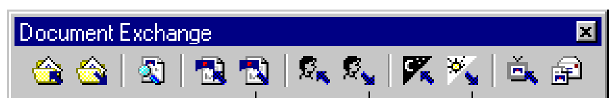
Find Documents

The Find button on the Document Exchange toolbar lets you choose the type of document that you want to retrieve. You can also narrow down your search with parameters such as data source. For more information, see “Using search criteria to find published documents” on page 201.

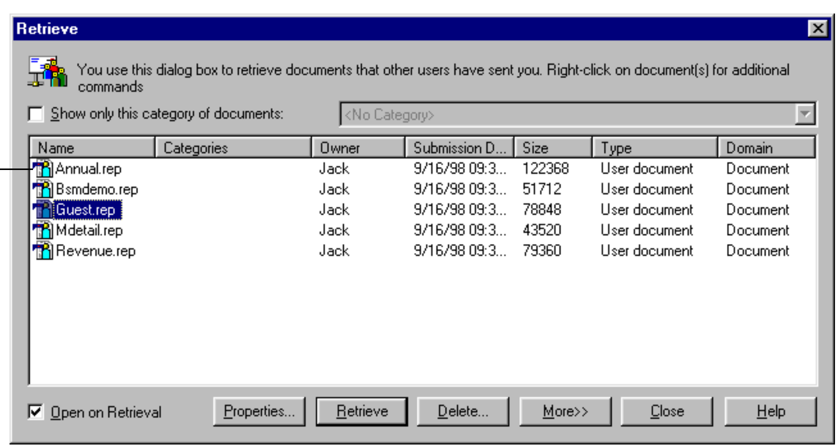
To retrieve documents

Here’s how to retrieve documents from the repository:

1. On the Document Exchange toolbar, click the button corresponding to the type of document you want to retrieve.



The Retrieve dialog box appears. A list of documents appears in the Name column.

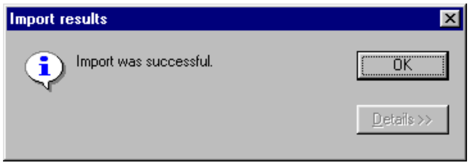


Tip: To filter the list of documents, select a category in the list box next to *Show only this category of documents*.

2. To retrieve a single document, double-click its name in the list. To retrieve several documents, hold down the Ctrl key on your keyboard, then click each document you want to retrieve.

3. Click Retrieve.

- BUSINESSOBJECTS imports the documents from the repository to the UserDocs folder on your computer.
- When the documents have been successfully retrieved, BUSINESSOBJECTS displays the following confirmation message:



- The retrieval of documents sent directly by users removes them from the repository. This is not the case for published documents, which only the BUSINESSOBJECTS supervisor can remove.

Can you view and retrieve documents that arrive as you work?

Yes and no. Whether you can view and retrieve documents that arrive as you work depends on your user profile, set by your BUSINESSOBJECTS supervisor. Here is an example that illustrates this point.

Example **Viewing a document as soon as it arrives in the repository**

At 9 a.m., you launch BUSINESSOBJECTS and enter your user name and password. This means that you are connected to the repository.

At 9.15 a.m., one of your colleagues then sends you a document using Send To>Users (or Publish To>Corporate Documents). In the Retrieve dialog box, you may or may not be able to access this document right away:

- The document appears in the Retrieve dialog box, provided that the BUSINESSOBJECTS supervisor declared you as a “real-time” user.
- If you are not a real-time user, you have to log in to BUSINESSOBJECTS again to view the document. To do this:

1. Select Login As on the Tools menu.

2. Enter your user name and password, then click OK.
BUSINESSOBJECTS updates the information in the repository.

3. Select Retrieve From>Users (or Retrieve From>Corporate Documents, depending on the command used to send the document).
   The document that was sent since the first time you logged on is now visible.

4. Follow “To retrieve documents” on page 197 to retrieve the document.

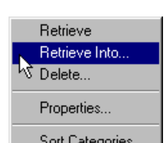
Ask your supervisor to change your user profile to real-time if you need to view documents as they arrive in the repository.

Note: If you are connected to BUSINESSOBJECTS using a web connection, you will not be notified that new documents have arrived even if you are a real-time user.

What else can you do when retrieving documents?

The Retrieve dialog box lets you do more than just retrieve documents. What if you want to view only one category of documents, such as Sales? Display the list of documents by submission date, or check a document’s data source? Here’s what you can do:

To...	Do this...
Filter documents by category	Click *Show only this category of documents*, then select the category from the list box.
Sort the list of documents	Click a column heading. For example, to view documents in the order in which they were sent, click the Submission Date column heading.
Set the order in which categories appear	**1.** Right-click any document. **2.** Select Sort Categories on the pop-up menu. **3.** Define the order of the categories in the dialog box that appears.
Delete documents	**1.** Hold down the Ctrl key and click each document you want to delete. **2.** Click the Delete button. If the Delete button is grayed, the supervisor hasn’t granted you the right to delete documents from the repository.

To...	Do this...
View document properties	Click a document, then click Properties. In the Document Properties dialog box that appears, you can view the information such as the last time the document was refreshed. All the properties that you can view are listed below. Note that this information is read-only; you cannot change it in any way. In the Data Provider tab, you can find out: • The document's owner and size • The date it was last published or printed • The categories assigned to the document • How many data providers the document contains • The document's data sources • The date and time the owner created the document • The number of rows of data returned the last time the document was refreshed • Whether or not a partial result was returned • How long the last refresh took. In the Document tab, you can find out the document's title, subject, keywords and comments. The person who created the document has to enter this information by using the Properties command on the File menu. So, the Document tab may be blank.
Retrieve documents into a folder other than UserDocs	**1.** Hold down the Ctrl key and click each document. **2.** Press the right-mouse button, then select the Retrieve Into command on the pop-up menu.  **3.** Specify the path to the folder in the dialog box that appears, then click OK.

To...	Do this...
Use search criteria to find documents	**1.** Click the More>> button. **2.** Use the options described on page 203 to define your search criteria.
Retrieve then open documents in BUSINESSOBJECTS	**1.** Check *Open on Retrieval*. **2.** Select your documents, then click Retrieve. BUSINESSOBJECTS imports the documents from the repository to your computer (UserDocs folder), and displays them.

Using search criteria to find published documents

In organizations that deal with hundreds or even thousands of documents, you can spend a lot of time finding the documents you need. You may want to find documents containing data from a specific data source, but how do you know which documents these are?

BUSINESSOBJECTS provides a Find feature which lets you search for documents by:

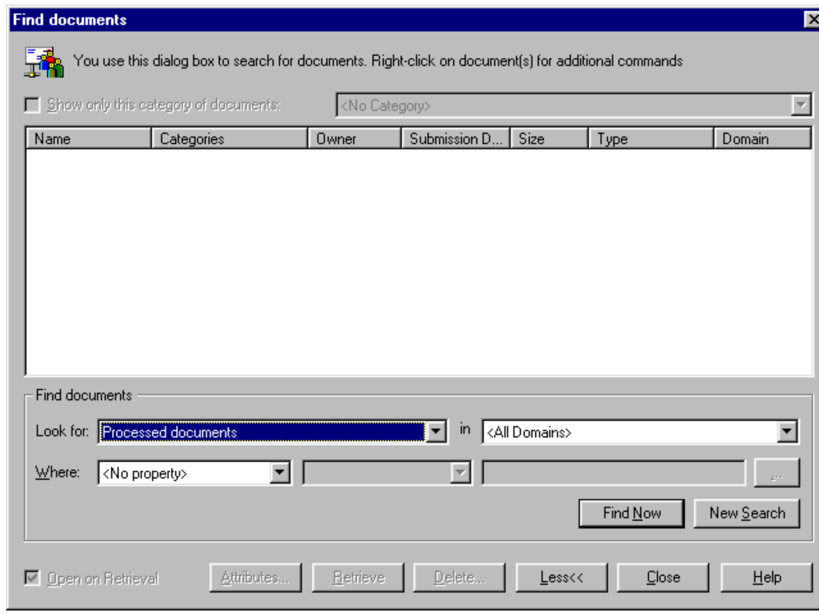
- Type, i.e., documents that other users have sent, that other users have published, or that BROADCAST AGENT has processed and distributed via the repository.
- Other information, such as creation date, data source, size, and category.

Tip: At any point during a search, you can click New Search to start over.

Find Documents

To use search criteria to find documents in the repository:

1. Click the Find Documents button on the Document Exchange toolbar. The Find Documents dialog box appears, empty for now.



2. In the *Look for* list box, select the type of document you want to find. Available types are described in the following table:

Select...	To display...
<All documents>	Documents that other users have sent or published, or that BROADCAST AGENT has processed, plus: • ReportScript scripts from BUSINESSOBJECTS 4.1 (.spt and .sbx files) • VBA macros • Queries from BUSINESSQUERY that you can open in BUSINESSOBJECTS • WEBINTELLIGENCE documents that you can open in BUSINESSOBJECTS • BUSINESSOBJECTS templates (extension .ret).
Corporate documents	Documents that users have published to the repository using the Publish To>Corporate Documents command.
Processed documents	Documents that BROADCAST AGENT has successfully processed and distributed through the repository.
User documents	Documents that users have sent using the Send To>Users command.

3. Select an option in the Domains list box:
   - *All domains* displays documents in all domains.
   - A specific domain displays documents in that domain only.

   Only the domains that your user profile lets you access appear in the list.

4. In the *Where* list box, select a property to narrow down your search. The properties that you can use are described in the table below. If you are using properties to find WEBINTELLIGENCE documents, refer now to "Which properties can you use to find WebIntelligence documents?" on page 207.

Select...	To find documents...
Categories	that either belong or do not belong to categories that you select. When you use this property: • Select *contains* or *does not contain*. • Click ... then select categories in the dialog box that appears.
Comments	whose comments include a character string that you specify. You assign comments to a document using the Properties command (File menu) in BUSINESSOBJECTS. When you use this property: • Select *contains* or *does not contain*. • Type a character string in the text box.
Data provider name	containing a data provider whose name includes a character string that you specify. When you use this property: • Select *contains* or *does not contain*. • Type a character string in the text box.
Document	which either have or do not have document properties. When you use this property, select *has properties* or *has no properties*. This option is especially useful for finding BUSINESSOBJECTS 4.x documents: document properties are a feature of BUSINESSOBJECTS 5.0, so if you select *Document* then *has no properties*, you will find only 4.x documents.

Select...	To find documents...
Keywords	whose keywords include a character string that you specify. You assign keywords to a document using the Properties command (File menu) in BUSINESSOBJECTS. When you use this property: • Select *contains* or *does not contain*. • Type a character string in the text box.
Name	whose file name contains a character string that you specify. When you use this property: • Select *contains* or *does not contain*. • Type a character string in the text box.
Size	of a particular size. When you use this property: • Select *is equal to*, *is less than* or *is more than*. • Enter a value in Kilobytes in the text box.
Source	containing data from a source that you specify. For example, this condition lets you search for all documents containing queries on a given universe such as eFASHION. The data source name is displayed in the Definition tab of the Data Manager (View Data command, Data menu) in BUSINESSOBJECTS. When you use this property: • Select *contains* or *does not contain*. • Type a data source name in the text box.
Subject	whose subject includes a character string that you specify. You assign a subject to a document by using the Properties command (File menu) in BUSINESSOBJECTS. When you use this property: • Select *contains* or *does not contain*. • Type a character string in the text box.
Submission Date	that were submitted before or after a date and time that you specify. When you use this property: • Select *before* or *after*. • Click ... to the right of the text box to enter a date and time.

Select...	To find documents...
Title	whose title includes a character string that you specify. You assign a title to a document using the Properties command (File menu) in BUSINESSOBJECTS. When you use this property: • Select *contains* or *does not contain*. • Type a character string in the text box.
Total # of categories	that belong to a given number of categories. When you use this property: • Select *is equal to*, *is less than* or *is more than*. • Type a number in the text box.
Total # of rows	by the number of rows of data that the documents contain. When you use this property: • Select *is equal to*, *is less than* or *is more than*. • Type a number in the text box.
Total duration	by the length of time that the documents last took to refresh. When you use this property: • Select *is equal to*, *is less than* or *is more than*. • Type the total number of seconds in the text box.

5. Click Find Now.
   BUSINESSOBJECTS displays the documents corresponding to the search criteria you set. The number of documents found is displayed in the bottom left corner of the dialog box.

Tip: All the Find options described above are also available in the Retrieve dialog box (illustrated on page 197).

Just click the More>> button. The Retrieve dialog box expands to make the Find options available.

Which properties can you use to find WebIntelligence documents?

The only properties that you can use to find WEBINTELLIGENCE documents are as follows:

- Name
- Size
- Submission Date
- Categories
- Keywords.

This means that if you use any other property in your search, you will not find WEBINTELLIGENCE documents.

Viewing retrieved documents in BusinessObjects

Once you've retrieved published documents, open them in BUSINESSOBJECTS using the File/Open command.

Tip: The *Open on Retrieval* option in the Retrieve dialog box automatically opens all documents that you retrieve. If you activate *Open on Retrieval* then double-click a document name in the Retrieve dialog box, the document appears immediately in BUSINESSOBJECTS.

Chapter 9 Sending and Publishing BusinessObjects Documents

In this chapter

Overview

You can distribute documents with BUSINESSOBJECTS thanks to the repository, which the BUSINESSOBJECTS supervisor sets up. Part of this repository, called the document domain, stores the documents that users send or publish. It also stores information about the documents, such as the names of the users who sent them, who can retrieve them, and the date and time they were sent.

Easy to publish BusinessObjects documents for Web users

BUSINESSOBJECTS repository-based architecture allows you to distribute information across your enterprise. By publishing a BUSINESSOBJECTS document on the repository, you let not only BUSINESSOBJECTS, but also INFOVIEW users view and retrieve the document over the Web. BUSINESSOBJECTS automatically generates the HTML required to view the document in a Web browser.

In BUSINESSOBJECTS, you can also view documents that WEBINTELLIGENCE users have created and published.

INFOVIEW users can also view BUSINESSOBJECTS documents in an enhanced format that displays and prints documents as if they were open in BUSINESSOBJECTS (same fonts, page layout etc.) -- and all this over the Web, corporate intranet or extranet.

What’s the difference between sending and publishing?

Sending documents to other users and publishing documents are both ways of sharing BUSINESSOBJECTS documents. Their common denominator is the repository, which stores sent and published documents, and permits other users to retrieve them.

The differences are as follows:

- Documents that you send do not remain in the repository when other users retrieve them.
  Sending documents is thus the ideal method for communicating information to individual people rather than to groups of users.
- Documents that you publish remain in the repository until the BUSINESSOBJECTS supervisor removes them.

  This method is similar to publishing documents on a forum or server. It is ideal for communicating information across an organization or enterprise. Documents that you publish are called corporate documents.

What kinds of documents can you send and publish?

You can send and publish not only BUSINESSOBJECTS documents (.rep files) but also add-ins and BUSINESSOBJECTS templates.

Who can retrieve the documents you send or publish?

When you send or publish documents, you specify which users or groups of users will be able to retrieve the documents from the repository. Any BUSINESSOBJECTS or INFOVIEW users with access to the repository will also be able to view the documents.

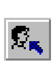
BUSINESSOBJECTS supervisors are responsible for setting up users and groups. A group of users typically consists of people working in the same department or on shared projects. You can belong to one or several groups, and have access to one or more of the repository's document domains.

The users you can select vary depending on whether you're sending or publishing documents:

- When you send documents, you can select individual users and/or groups of users.
- When you publish documents, you can only select groups of users.

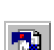
How do categories help you manage documents?

When you send or publish documents, you can select categories, which enable people in your organization to filter the list of documents as they view them on the repository. Selecting categories is described under "Sending documents to other users" on page 214 and "Publishing Corporate Documents" on page 219. Viewing documents by category is described under "What else can you do when retrieving documents?" on page 199.



Send to Users

You can select categories for documents whether you send or publish them. However, INFOVIEW users can only view corporate document lists by category in their Web browser. In other words, categories are not available in INFOVIEW for documents that you send using the Send To>Users command or toolbar button. In INFOVIEW, documents that you send in this way appear in the INFOVIEW inbox.



Publish to Corporate Documents

So, if you want INFOVIEW users to use categories to filter document lists in their Web browser, you must publish the documents using the Publish To>Corporate Documents command or toolbar button.

Categories are available in BUSINESSOBJECTS objects for all types of documents.

Creating, renaming and deleting categories

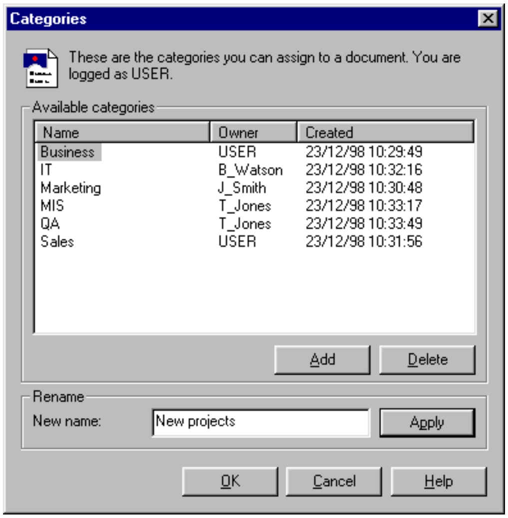
In BUSINESSOBJECTS, you can create, rename and delete categories. (The supervisor will probably not let all users perform these tasks.) To create, rename or delete categories:

1. Select the Send To>Users or Publish To>Corporate Documents command on the File menu.
   The Send dialog box appears.
2. Click Categories.
   The Select Categories dialog box appears.
3. Click Manage.

Note: If the Manage button is grayed out, it means that the supervisor has not granted you the right to create, rename or delete categories. You can only select categories when you send or publish documents.

Ask you supervisor to create, rename or delete the categories, or to change your user profile so that you can do it yourself. Alternatively, use the Login As command, then enter the user name and password of a user who does have the right to create, rename and delete categories.

The Categories dialog box appears.



4. The next step depends on what you want to do:

To...	Proceed as follows...
Create a category	• Click Add. • Type a name for the category in the New Name box. • Click Apply.
Rename a category	• Click the category. • Type the new name in the New name box. • Click Apply.
Delete a category	• Click the category in the list, then click Delete.

5. Click OK in the Categories dialog box, then OK again in the Select Categories dialog box.
   You return to the Send dialog box.

6. Continue to work with the dialog box if you are sending or publishing documents; otherwise, click Cancel.

E-mail distribution

You can send documents by electronic mail, thanks to an interface between BUSINESSOBJECTS and Microsoft Outlook/Exchange. To benefit from this feature, you must have Microsoft Outlook for Windows installed on your computer.

Sending Documents to Other Users

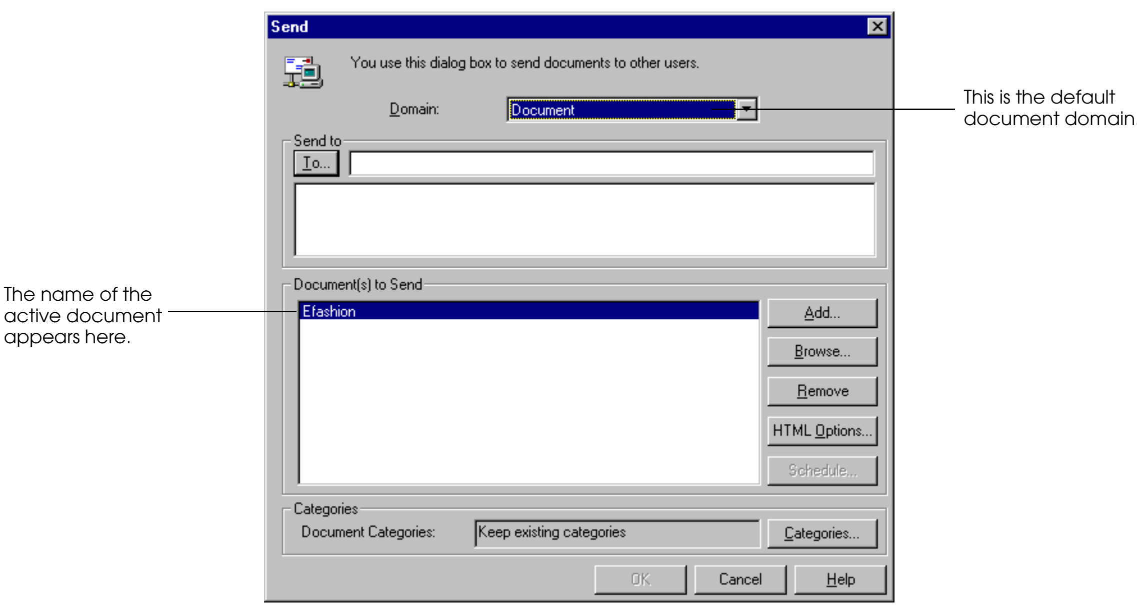
Sending documents is the ideal method for communicating information to both individual users and groups of users. When you send documents, you select users and/or groups of users who will be able access the documents. You can also associate documents with categories, which will make it easier for other users to find the documents they're interested in.

Sending documents to other users

To send documents to other users:

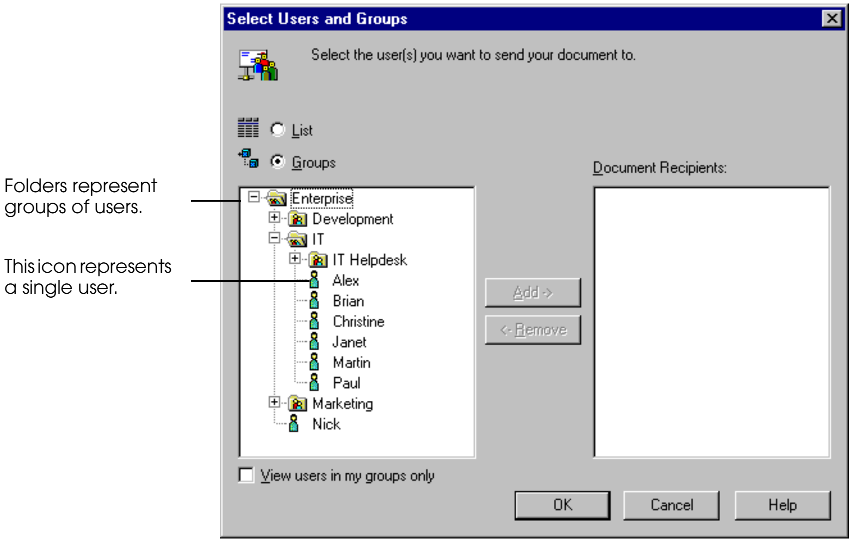
Send to Users

1. Click the Send To Users button on the Document Exchange toolbar.
   The Send dialog box appears. It displays the default document domain and the name of the active document.



2. To select a different domain, click the Domain list box.
   Document domains are set up by the BUSINESSOBJECTS supervisor. If more than one domain is available and you don't know which one to select, contact your supervisor.

3. Click To.
The Select Users and Groups dialog box appears.



4. Select a viewing option:

Click...	To view...	This view is useful when...
List	All users and groups as one flat list.	You just want the list of groups and users in alphabetical order, which enables you to find users by name.
Groups	Users in the groups in which they belong.	You want to see which groups other users and groups belong to. The supervisor may not have given you the right to use this view, in which case the Groups button is grayed.
View users in my groups only	Only the users that belong to the same group(s) as you.	You don't want to send documents to anyone in other groups.

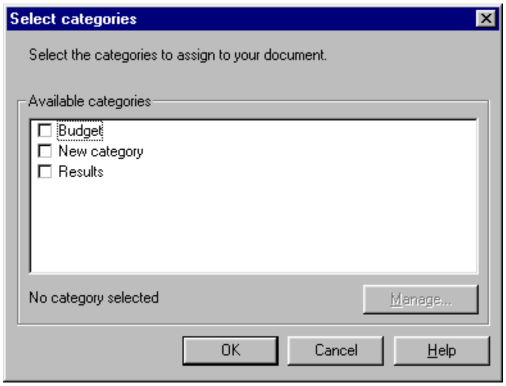
5. Hold down the Ctrl key, click the users and groups you want to send documents to, then click OK.
   You return to the Send dialog box. The icons of the users and groups you have selected appear in the Send to box.

6. To select the documents you want to send:

Click this button...	To select documents that...
Add	Are open in BUSINESSOBJECTS
Browse	Are not open in BUSINESSOBJECTS.

Reminder: You can send and publish not only BUSINESSOBJECTS documents but also other types of files such as Add-ins to other users.

7. To allow recipients to view the documents by category, click Categories. This is useful in organizations dealing with large numbers of documents.
   The Select Categories dialog box appears.

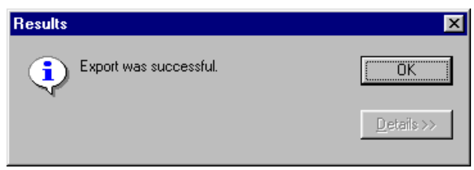


8. Check each category you want, then click OK. Refer to “How do categories help you manage documents?” on page 211 for more information.

Publish to Corporate Documents

Tip: BUSINESSOBJECTS users can view all types of documents by category on the repository. INFOVIEW users, who view documents in the Web browser, can only view corporate documents by category. Therefore, if you want INFOVIEW users to benefit from categories, you must publish your documents using Publish To>Corporate Documents.

9. Click OK in the Send dialog box.
BUSINESSOBJECTS displays a message to show that you successfully sent the documents to other users.



Sending documents by e-mail

You can send documents by electronic mail thanks to an interface between BUSINESSOBJECTS and Microsoft Exchange. In order to use this feature, you must have Microsoft Exchange or Microsoft Outlook installed on your computer.

To send a document by e-mail:

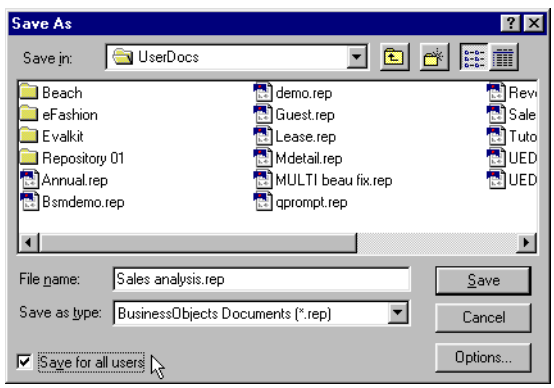
1. Open the document in BUSINESSOBJECTS.

2. Select the Send To>Mail command on the File menu.
A new e-mail message opens in your e-mail application.
The document is automatically attached.

Tip: Are you sure that the person you e-mailed the document to will be able to open it in BUSINESSOBJECTS? If you launched BUSINESSOBJECTS online, i.e., did not select *Work in offline mode* in the User Identification dialog box, that means you're working with a connection to the repository. The e-mail recipients will *only* be able to open the document if they too are working online. If they are working offline, the error message *You are not authorized to use this document* will appear.

To avoid this problem:

1. Select the Save As command on the File menu, or press F12.
2. In the Save As dialog box that appears, select *Save for all users.*



3. Click Save.
   Any BUSINESSOBJECTS user who receives this document by e-mail will be able to open it.

Publishing Corporate Documents

Publishing documents allows groups of people across an organization or enterprise to have access to information they need. The BUSINESSOBJECTS repository enables you to publish your documents, which other users can then view and retrieve.

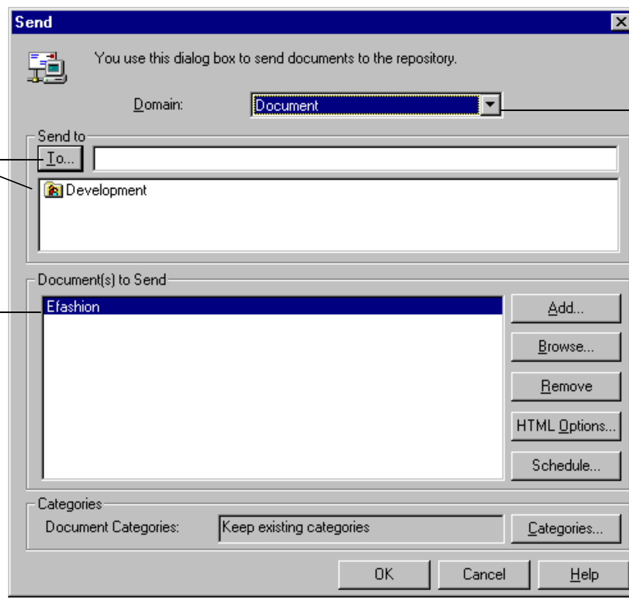
When you publish documents to the repository, you select groups of users who will be able to access the documents. You can also associate documents with categories, which makes it easier for other users to find the documents they need.

Reminder: When you publish a BUSINESSOBJECTS document, you automatically share it with INFOVIEW users who have access to the repository. BUSINESSOBJECTS generates the HTML version of the document behind the scenes, but you can control the HTML document by setting options. For more information, refer to "Setting HTML Options" on page 223.

To publish corporate documents

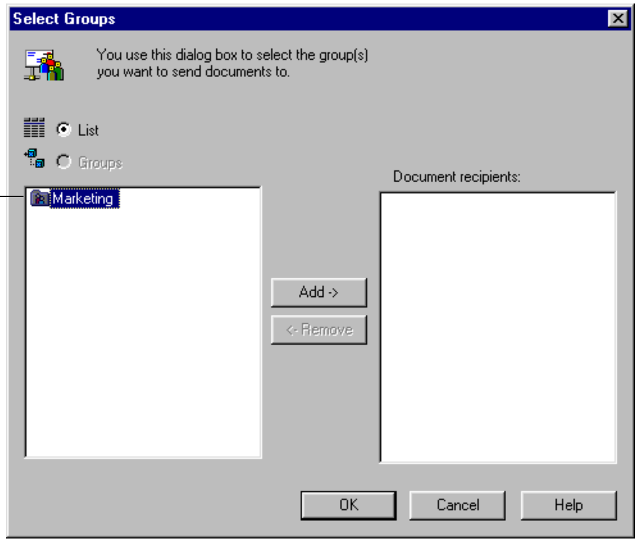
Publish to Corporate Documents

1. Click the Publish to Corporate Documents button on the Document Exchange toolbar.
   The Send dialog box appears.
   - If you belong to just one user group, the icon for that group is already selected.
   - The default document domain and the name of the active document are displayed.



2. To select a different domain, click the Domain list box.
   Document domains are set up by the BusinessObjects supervisor. If more than one domain is available and you don't know which one to select, contact your supervisor.

3. To select groups of recipients, click To.
   The Select Groups dialog box appears.



When you publish a document, the Select Groups dialog box shows only groups of users, not individual users. In this view, you cannot see the users within each group. That's why the Groups button is grayed.

4. Hold down the Ctrl key and select the groups you want from the left pane.

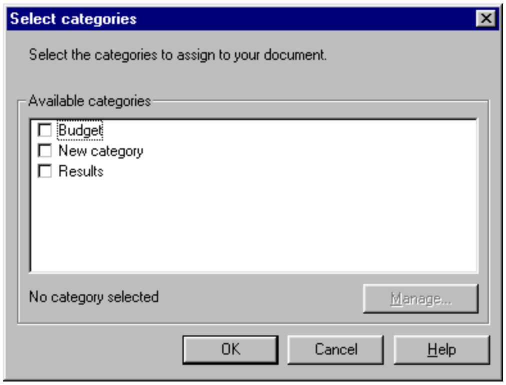
5. Click Add then click OK.
   You return to the Send dialog box.

6. To select the documents you want to send:

Click this button...	To select documents that...
Add	Are open in BUSINESSOBJECTS
Browse	Are not open in BUSINESSOBJECTS.

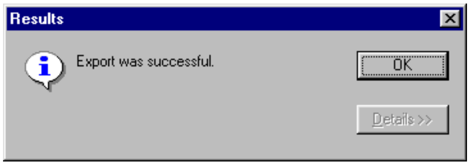
Reminder: You can send and publish not only BUSINESSOBJECTS documents but other types of files such as Add-ins to other users.

7. To allow the recipients to view the documents by category, click Categories. This is useful in organizations dealing with large numbers of documents. The Select Categories dialog box appears.



8. Check each category you want, then click OK. Refer to “How do categories help you manage documents?” on page 211 for more information.

9. Click OK in the Send dialog box. BUSINESSOBJECTS displays a message to show that you have successfully published the documents to the repository.



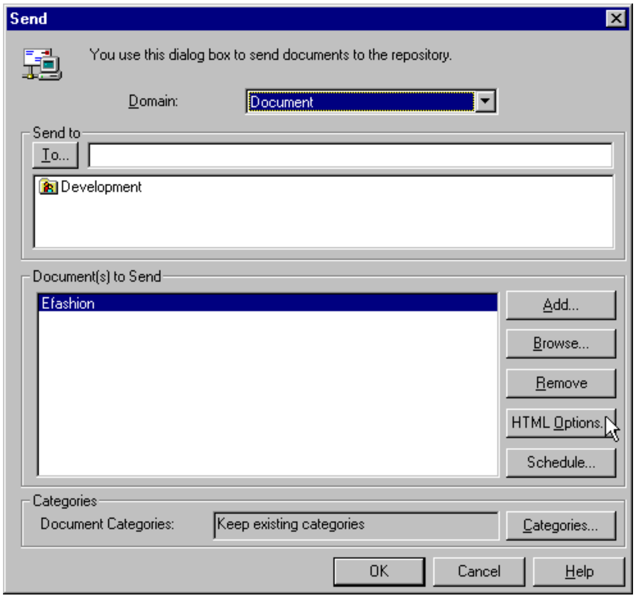
Setting HTML Options

When you send a BusinessObjects document to other users or publish it to the repository, BusinessObjects automatically generates the HTML required to view the document in InfoView. Thus, you can automatically distribute your business information to InfoView users who have access to the repository.

BusinessObjects lets you set options for the HTML version of the document. For example, you can decide to display the charts in your document as .gif files, or whether or not to use frames.

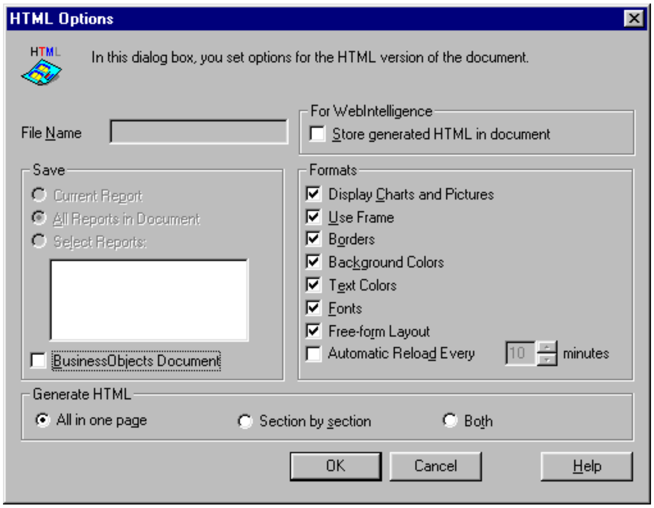
To set HTML options when sending or publishing a document:

1. Select the Send To>Users command or Publish To>Corporate Documents command on the File menu.
2. In the Send or Publish dialog box, click HTML Options.



Tip: You can set HTML options for several documents at the same time. Just hold down the Ctrl key, click each document in the Send dialog box, then click the HTML Options button. The options that you set will be applied to all the selected documents.

The HTML Options dialog box appears.



3. If you're sending the document to INFOVIEW users, check *Store HTML in document*.
   - This option stores the HTML required to display the document in a browser before the document is sent.
   - If you don't check this option, the HTML will be generated on the server when WEBINTELLIGENCE (INFOVIEW) users view the document. This can take up a lot of server memory allocation.

4. In the Save group box, check *BusinessObjects Document* to allow other users to download the document.
   Note that the options *Current Report*, *All Reports in Document* and *Select Reports* are grayed. This is normal when you are sending or publishing a document.

5. Select formatting options in the Format box.

6. Select an option in the Generate HTML group box.
   These options determine the way users can navigate through the document in their Web browser:

This option...	Publishes each document...	And enables users to...
All in One Page	As one HTML page.	Print or search whole documents.
Section Per Section	With a browser which contains a link to each document section. Each section generates one HTML file.	Jump from section to section, especially useful in large documents.
Both	Displays the browser as with the *Section Per Section* option, but also lets users view the document in one page.	Switch between the one-page view and the per-section view.

7. Click OK in the HTML Options dialog box.
   You return to the Send or Publish dialog box, where you can set other options such as categories before sending or publishing the document.

For information on how WEBINTELLIGENCE users view BUSINESSOBJECTS documents, see “The Open on Retrieval option in the Retrieve dialog box automatically opens all documents that you retrieve. If you activate Open on Retrieval then double-click a document name in the Retrieve dialog box, the document appears immediately in BUSINESSOBJECTS.” on page 207.

Chapter 10

Scheduling BusinessObjects Documents

In this chapter

Overview

BROADCAST AGENT lets you automate the communication of business information across your company or organization, and over the Web.

Using BROADCAST AGENT to distribute and publish documents means automatically processing your documents at specified times or intervals. For example, BROADCAST AGENT can send a refreshed copy of a document to a list of recipients at the same time every evening. This type of distribution is also referred to as *scheduled processing*, or *batch processing.*

What can Broadcast Agent do?

BROADCAST AGENT offers a rich functionality set, enabling you not only to automate tasks such as refreshing and printing, but also to control processing with conditions, and to publish your documents via the BUSINESSOBJECTS repository or the World Wide Web. The following table gives an at-a-glance overview of what BROADCAST AGENT can do, and indicates which features are new:

	BROADCAST AGENT At A Glance	New?
BROADCAST AGENT can do all this to your document...	• Refresh and print	
	• Use a printer that you select, not just the default	✓
	• Report bursting, i.e., refresh the document with each recipient's user profile	✓
	• Save as .rtf, .txt or .pdf	✓
	• Perform custom tasks with VBA macros	✓
	• Publish on channels	✓
	• Begin processing only if a condition such as increased revenue is met.	
Based on a schedule...	• At regular times or intervals, for example every Friday at midnight.	
	• At start and stop dates that you set.	

BROADCAST AGENT At A Glance		New?
And/or when another file is present...	• Process your document only when another file is present.	✓
Then distributes the processed document...	• To individual users via the repository	
	• As corporate documents, to groups of users	✓
	• Over the World Wide Web (or intranets and extranets)	
	• On the server file system	
	• Or on all of the above.	

What's in this chapter, and where you can get more information

This chapter describes how to distribute BUSINESSOBJECTS documents by sending them BROADCAST AGENT for scheduled processing. It covers all basic scheduling features, and provides a Frequently Asked Questions section.

For more information on BROADCAST AGENT, refer to:

- Chapter 4 "Publishing, Sending and Scheduling Documents" on page 119, which explains how to schedule WEBINTELLIGENCE documents in INFOVIEW.
- Chapter 11 "Advanced Document Scheduling and Troubleshooting" on page 261, which brings you the best in tips and tricks for scheduling BUSINESSOBJECTS documents, information on customized document processing with VBA macros, plus advanced calculation features, troubleshooting and enhancements.
- The *Deployment Guide* and the *Broadcast Agent Administrator's Guide*, which provide information about setting up, managing and troubleshooting BROADCAST AGENT on the server side.
- The *Installation Guide* for information on setting up BROADCAST AGENT.
- The *Error Message Guide* to find out how to fix errors returned by BROADCAST AGENT.

Frequently Asked Questions

This section provides answers to some frequently asked questions about document scheduling. The information here is particularly relevant if you are updating from BUSINESSOBJECTS 4.1 to BUSINESSOBJECTS 5.x, and from DOCUMENT AGENT SERVER to BROADCAST AGENT.

Can you send a 4.1 document to Broadcast Agent?

When your company or organization is in the process of updating to BUSINESSOBJECTS 5.x, you may find yourself in a situation where you are still using BUSINESSOBJECTS 4.1 but your administrator has installed BROADCAST AGENT. With BUSINESSOBJECTS 4.1, you automated document processing with DOCUMENT AGENT SERVER.

No problem - BROADCAST AGENT can process BUSINESSOBJECTS 4.1 documents and send them back to you and other users as 4.1 documents.

Note: If a 4.1 user sends a document to BROADCAST AGENT and chooses to distribute the processed document on the repository, all users with access to that repository can view and retrieve the document. If a 5.x user retrieves, refreshes or in any way alters the 4.1 document, then publishes it on the repository once more, 4.1 users will not be able to open it.

In summary: BUSINESSOBJECTS 5.x documents are not supported in BUSINESSOBJECTS 4.x.

Will custom scripts work in this version?

DOCUMENT AGENT SERVER 4.1 could process custom scripts that users attach to documents. A script performs a non-standard task such as informing recipients by e-mail that DOCUMENT AGENT SERVER successfully refreshed a document.

DOCUMENT AGENT SERVER has now been replaced by BROADCAST AGENT, which also supports custom actions via scripting. In version 4.1, scripts were written in ReportScript, but in version 5.x, Microsoft Visual Basic for Applications (VBA) is the supported language.

BROADCAST AGENT automatically converts ReportScript scripts to VBA macros when processing your documents. However, you can convert your scripts before sending them to BROADCAST AGENT by using the Convert from ReportScript command in BUSINESSOBJECTS (Tools menu, Macro submenu).

Note: The ReportScript to VBA conversion works well, but some ReportScript code will require minor tweaking when converted to VBA. An appendix in the *BusinessObjects SDK Reference Guide* describes cases where you have to tweak the VBA result.

Updating scripts that send e-mail via Microsoft Outlook

Using scripts in 4.1, you could use DOCUMENT AGENT SERVER to send e-mail via Outlook, for example to inform recipients that DOCUMENT AGENT SERVER had successfully processed a document. When you update from BUSINESSOBJECTS 4.1 to the current version, you can continue to customize document processing with e-mail by attaching VBA macros to documents that you send.

If your organization has updated to BROADCAST AGENT but you are still working with BUSINESSOBJECTS 4.1, you can continue to send your 4.1 documents containing scripts that send e-mail. There is one exception, however: if your administrator previously used DOCUMENT AGENT SERVER not as an NT service, scripts that generate e-mail will not work when you update to BROADCAST AGENT.

Recommendation

If your organization has updated from DOCUMENT AGENT SERVER to BROADCAST AGENT, and you need to continue processing your document with the script that sends e-mail, we recommend that you:

1. Update from BUSINESSOBJECTS 4.1 to the current version.
   The *Installation Guide* contains information on how to do this.

2. In the updated version of BUSINESSOBJECTS, convert the script to a VBA macro, using the Convert From command (Tools menu).

3. Send the document to BROADCAST AGENT, referring to “What do you want Broadcast Agent to do to your document?” on page 237 for full information.

Can you schedule BusinessObjects documents from your Web browser, using InfoView?

Yes. INFOVIEW users can view, refresh, print, publish, save, and schedule BUSINESSOBJECTS documents over the Web.

Can you schedule WebIntelligence documents in BusinessObjects?

Strictly speaking no, because although you can open WEBINTELLIGENCE documents in BUSINESSOBJECTS, you cannot save them as WEBINTELLIGENCE documents. You can only save them as BUSINESSOBJECTS documents.

However, if you retrieve a WEBINTELLIGENCE document from the repository (Retrieve From>Corporate Documents, or Retrieve From>Users commands), then open that document in BUSINESSOBJECTS, you can schedule it as a BUSINESSOBJECTS document. Behind the scenes, BUSINESSOBJECTS saves the document as BUSINESSOBJECTS document (.rep file).

We advise you to schedule BUSINESSOBJECTS documents only using BUSINESSOBJECTS. If you need to schedule WEBINTELLIGENCE documents, use INFOVIEW, as described in Chapter 4 "Publishing, Sending and Scheduling Documents" on page 119.

Can you schedule BusinessQuery documents?

No. BUSINESSQUERY users can publish BUSINESSQUERY documents (queries) to the repository, but cannot schedule them - not in BUSINESSQUERY, BUSINESSOBJECTS or INFOVIEW.

Can Broadcast Agent process documents containing user objects?

Yes, but the user objects will be ignored, meaning that any data you need from these objects will not appear in the document.

Refer to "Does the document contain user objects?" on page 293 for further information.

Can Broadcast Agent process documents containing prompts?

Yes. BUSINESSOBJECTS displays the prompt when you send the document; BROADCAST AGENT then uses the values you entered when processing the document.

Scheduling a Document

You schedule a document by sending it to BROADCAST AGENT. This section gives a short, simple description of how BROADCAST AGENT processes your document.

Note: For more detailed information on how BROADCAST AGENT works on the server side, refer to the *Broadcast Agent Administrator's Guide*.

BROADCAST AGENT is installed on a server machine, not on the computer that you use to work with BUSINESSOBJECTS. The BROADCAST AGENT administrator is responsible for setting up the software on the server.

Your BUSINESSOBJECTS supervisor gives you and the other people in your user group with access to BROADCAST AGENT.

When you send a document to BROADCAST AGENT, you:

- Select general options such as document priority.
- Specify the actions that you want BROADCAST AGENT to perform.

  For example, you can have BROADCAST AGENT refresh and print the document. BROADCAST AGENT can also publish the document on channels, save it in rtf or text format, and run VBA macros when processing the document. Finally, you can set up condition-based processing, whereby BROADCAST AGENT only processes the document if a condition such as increased revenue is met.
- Select categories that you want the document to belong to.
- Set times or intervals at which BROADCAST AGENT will process the document.

  You can also set a schedule based on the existence of a file.
- Select options for publishing the document - on the repository, the World Wide Web or the file system.

Each of these stages is described in more detail below.

The document you send is stored in the document domain of the repository until BROADCAST AGENT is set to process it. For example, if you send a document at 10a.m. and request that BROADCAST AGENT process it at midnight, the document remains in the repository until midnight. At that point, BROADCAST AGENT:

- Opens the document in BUSINESSOBJECTS on the server
- Performs the actions that you specified when you sent the document

- Saves and closes the document
- Publishes the document on the repository, a Web server or the file system (depending on the options that you set when you sent the document).

This process is invisible to you because it takes place on the server.

First steps

You can send a document to BROADCAST AGENT if:

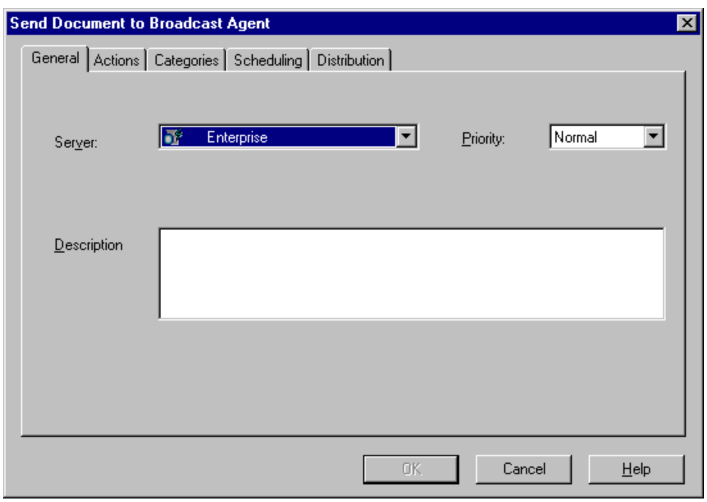
- The BUSINESSOBJECTS supervisor has granted you access to BROADCAST AGENT.
- You're working online.

To send a document to BROADCAST AGENT:

1. Open the document in BUSINESSOBJECTS.

Send To Broadcast Agent

2. Click the Send to Broadcast Agent button on the Document Exchange toolbar. The Send Document to Broadcast Agent dialog box appears with the General tab active.



3. To select a different BROADCAST AGENT than the one shown, click the Server list box.

Note: You will probably only have access to one BROADCAST AGENT.

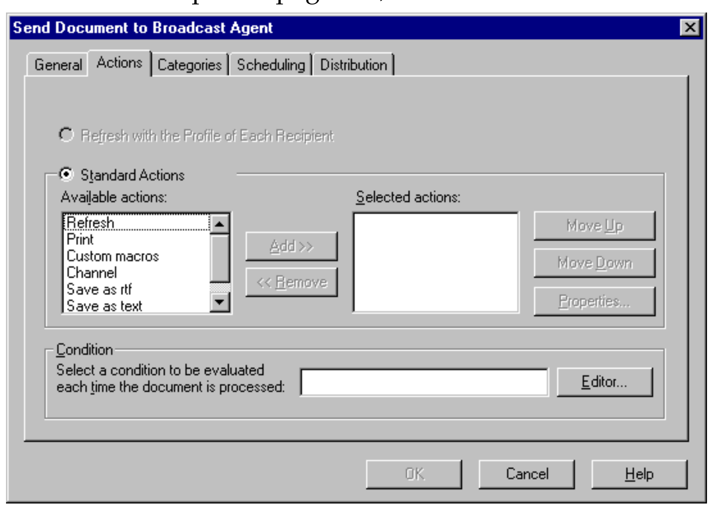
4. To change the task priority to Low or High, click the Priority list box.
5. If you like, write a description of the document in the Description box. This text can help other people identify the document after BROADCAST AGENT has processed and published it.

You are now ready to specify the actions, categories, scheduling and distribution options for the document.

What do you want Broadcast Agent to do to your document?

When you schedule a document, you have to define the actions such as refreshing or printing that you want BROADCAST AGENT to perform. Here's how to do it:

1. Follow "First steps" on page 236, then click the Actions tab.



2. You can now:

Click...	To have BROADCAST AGENT...
Refresh with the Profile of Each Recipient	Refresh the document according to the profile of the users who will receive it. This is also called report bursting. The advantage of this option is that recipients do not see information that is private, or available to users with different profiles. For example, your user profile (set up by the supervisor) might enable you to retrieve 1000 rows of data from the database. Other users might only be able to retrieve 500 rows, for security reasons. This option ensures that parameters such as these are respected; users who open the refreshed document do not receive information they should not see. • This option disables all other available actions, and allows you to distribute the document via the repository only. • If you're using this option, go to step 5.
Standard Actions	Select actions such as Print Document in the *Available Actions* list.

3. Specify the actions that you want BROADCAST AGENT to perform by using the following options in the Standard Actions box:

Double-click...	To have BROADCAST AGENT...
Refresh	Refresh the document. Note that this option: • Refreshes all the data providers in the document. • Refreshes the document in your name, i.e., with your user profile.
Print	Print the document on your default printer.
Use custom macros	Run a VBA macro when processing the document. This option opens the Macros dialog box, where you select or create a macro to attach to your document.
Channel	Publish the document on a Web channel that the BUSINESSOBJECTS supervisor previously set up.

Double-click...	To have BROADCAST AGENT...
Save as RTF	Save the document in rich text format. Note that using BROADCAST AGENT to generate RTF versions of BUSINESSOBJECTS documents can result in very large files. For example, an 800-page BUSINESSOBJECTS document results in a 50Mb RTF document.
Save as text	Save the document in text format.
Save as PDF	Save the document in Adobe Acrobat Portable Document Format (PDF).

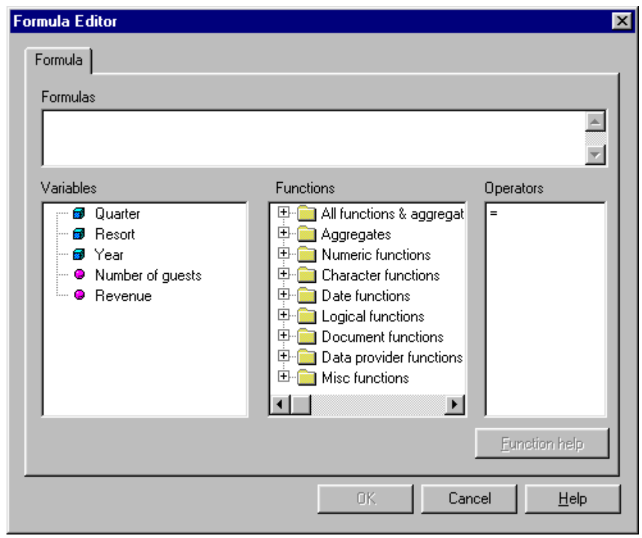
4. Click an action in the Selected Actions box, then click Move Up or Move Down to change its position in the actions list.
Note that BROADCAST AGENT performs the actions in the order in which they appear. Do you want to print the document *before* or *after* refreshing it?

Tip: You can use the Properties button to change the setting of the following selected actions:

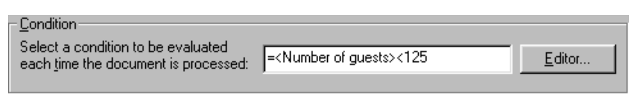
Print	Select a printer other than your default printer.
Use custom macros	Edit the VBA macro that you already selected, or select or create a different one.
Channel	Set properties such as HTML options. Authorized users can also create their own channels.
Save as RTF/text/PDF	Select the folder for the output .rtf, .txt, or .pdf files.

To use this feature, first click the action in the Selected Actions box, the click Properties.

5. Click the Editor button in the Conditions box if you want to define a formula to use as a condition that is evaluated every time BROADCAST AGENT processes the document.
   The Formula Editor appears.



6. Define the formula in the Formula box, then click OK.
   You return to the Actions tab, where the formula you defined now appears in the Condition field.



   Also, *Condition Evaluation* appears in the Selected Actions list box. Make sure the condition is in the right place in the list of actions, for example *before* Print to print the document only if the condition is true.

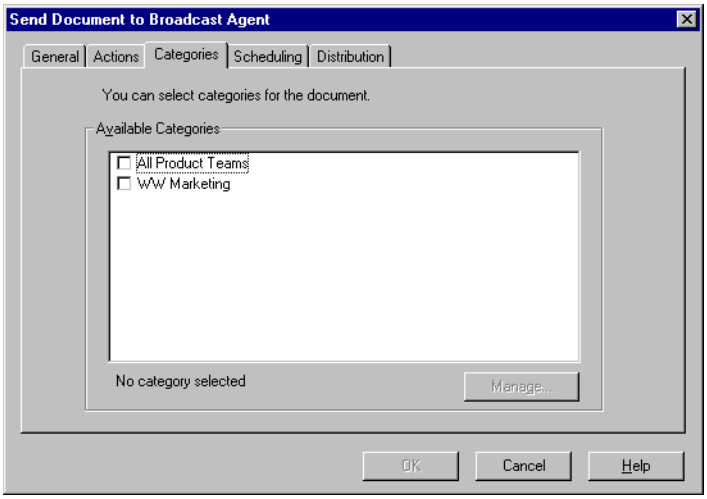
7. When you have finished defining the actions you want BROADCAST AGENT to perform, click OK to send the document, or click a different tab to select more options.

Which categories does the document belong to?

Categories enable users to sort and find published documents on the repository. For example, if sales consultants select the Sales category when they send documents to BROADCAST AGENT, other sales consultants will be able to find the processed documents quickly and easily on the repository.

To select categories for the document you're scheduling:

1. Follow "First steps" on page 236, then click the Categories tab.
   The categories you can use are listed.



2. Click the categories you want the document to belong to.
3. To create new categories, or to rename or delete existing ones, click Manage.
   The Manage Categories dialog box appears.
4. To add a category, click Add.
   The new category appears in the list of categories in the dialog box.
5. To rename a category:
   - Click the name of the category
   - Type the new name in the New name box
   - Click Apply.
6. To delete a category, click its name then click Delete.

7. Click OK to close the Categories dialog box.
   You return to the Send Document to Broadcast Agent dialog box.

8. Select any new categories you want to assign the document to, then click OK to send the document, or click a different tab to select more options.

When will Broadcast Agent process the document?

BROADCAST AGENT processes documents at times or intervals that you specify. All you have to do is set up these times in the Scheduling tab.

You can also have BROADCAST AGENT process a document based on the existence of another file. This feature is called File Watcher. Here's an example.

Example **Processing a document when your database back-up is complete**

System administrators may want to be certain that the database has been backed up before BROADCAST AGENT processes any documents. If BROADCAST AGENT attempts to process a document during back-up, the task will fail systematically. However, you can use a feature called *File Watcher* to avoid this problem.

Configure your system so that a text file is sent to a given location when the back-up process is complete. Then:

1. In the Scheduling tab, click *File Watcher*.

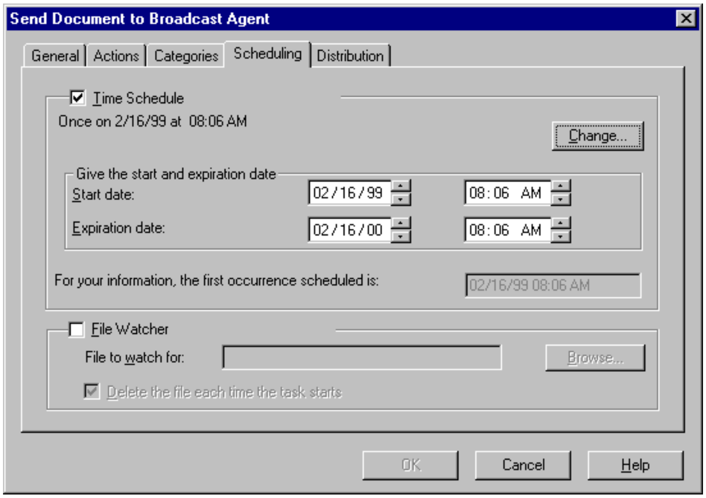
2. Specify the path to the file in the *File to watch for* field.
   BROADCAST AGENT will only process the document when the file is present in the specified location.

For more information on File Watcher

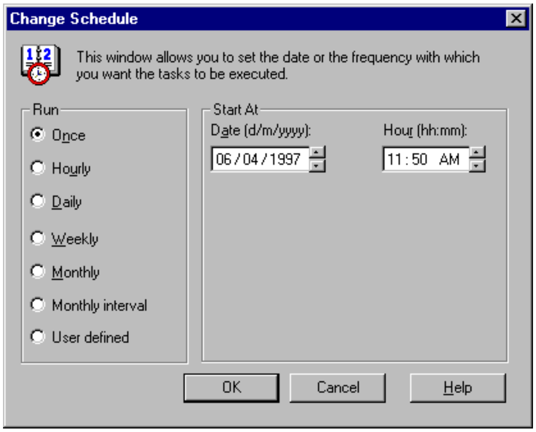
- You can find another, more detailed example of the File Watcher feature under "Starting a new task when another task ends" on page 270.
- For answers to questions such as where you can post the file to watch for, and what happens when BROADCAST AGENT cannot find the file, refer to "File Watcher Essentials" on page 131.

To set the schedule

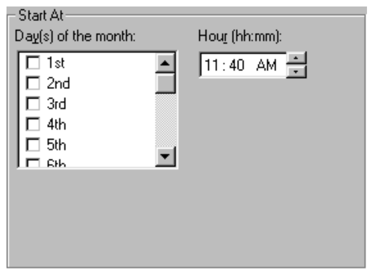
1. Follow “First steps” on page 236, then click the Scheduling tab.
   The current schedule is shown in the *Time Schedule* box.



2. Click Change to change the current schedule.
   The Change Schedule dialog box appears.



3. Click an option in the Run box, then change the settings in the Start At box. Note that the options in the Start At box change according to the Run option you select. For example, if you click Monthly in the Run box, the Start At options let you select the day(s) of the month on which you want Broadcast Agent to process the document.



4. Click OK to return to the Scheduling tab.

5. Specify the date and time you want Broadcast Agent to start processing the document by entering values in the *Start date* and *Expiration date* fields.

6. Check *File Watcher* if you want Broadcast Agent to process the document based on the existence of another file.
   - Click Browse to locate the file.
   - Use the name of the server machine where the file will be located, not the absolute path. In other words, if you enter "c:\my documents", you are pointing to c: drive of the machine you are working on, not the c: drive of the server.
   - Check *Delete the file each time the task starts* if you want Broadcast Agent to watch for the file every time it processes the document. Using this option enables "report chaining", whereby the file that triggers processing has to be present every time the document is due.

Tip: You can combine the *Time Schedule* and *File Watcher* options.

For answers to questions such as where you can post the file to watch for, and what happens when Broadcast Agent cannot find the file, refer to "File Watcher Essentials" on page 131.

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7. Click OK to send the document, or click a different tab to select more options.

How do you want to distribute the document?

Another advantage of BROADCAST AGENT is that it can distribute processed documents via the repository, the World Wide Web or the server file system.

Repository distribution

Distribution via the BUSINESSOBJECTS repository offers maximum security. You determine the list of users and groups of users who will receive the processed document.

When you choose to distribute a document via the repository, BROADCAST AGENT automatically generates an HTML version. This enables INFOVIEW users with access to the repository to view the document in a Web browser. INFOVIEW users can view the documents you send in HTML (the native language of Web browsers) and enhanced document format, which provides excellent navigation and print capabilities.

World Wide Web distribution

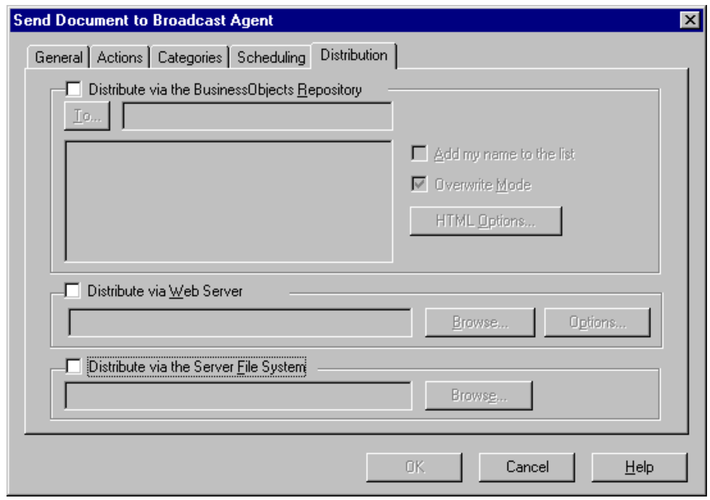
With World Wide Web distribution, BROADCAST AGENT processes your document then saves it in HTML format on a Web server that you specify. This method enables you to publish up-to-date information internally on your intranet, or to the outside world via the Internet.

Server file system distribution

BROADCAST AGENT can post your document to a folder on your server that you specify.

To set up the way Broadcast Agent will distribute the document

1. Follow the instructions in "First steps" on page 236, then click the Distribution tab.

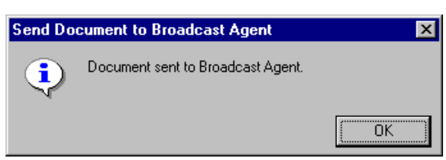


2. Select an option for distributing the document:

Select...	To...
Distribute via the BusinessObjects Repository	Publish the processed document on the repository.
To	Select the users or groups of users who will receive the processed document.
Add my name to the list	Send a copy of the document to yourself.
Overwrite mode	Overwrite the previous version of the document with the newly-processed version every time BROADCAST AGENT distributes the document.
HTML Options	Set options for the HTML version of the document (borders, frames, etc.). Remember that INFOVIEW users with access to the repository will be able to view the HTML version of the document.

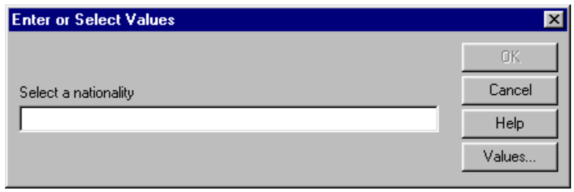
Select...	To...
Distribute via Web Server	Save the document in HTML format and publish it on the World Wide Web. • The field below this option indicates the path to Web server and the folder that will receive the published document. Specify a folder by clicking *Browse*, or by typing a path, e.g., `\\HostName\FolderName`. • See "Files and folders created with HTML documents" on page 313 for information on how BROADCAST AGENT manages the HTML file.
HTML Options	Set options for the HTML version of the document (borders, frames, etc.).
Distribute via the server file system	Send the document using your company's file system. The field below this option indicates the path to the folder that will receive the published document. Specify a folder by clicking *Browse*, or by typing a path, e.g., `\\HostName\FolderName`.

3. Click OK to send the document to BROADCAST AGENT.
The following confirmation message appears on your screen:



What to do if the Enter or Select Values dialog box appears

When you click OK to send your document to Broadcast Agent, the Enter or Select Values dialog box might appear.



This occurs because:

- Broadcast Agent has to refresh the document because you selected the Refresh option in the Actions tab.
- The document contains prompts, which ask you to select values for the document when you refresh it.

  For example, sales managers can select cities or product lines that they want to find out about. The prompt enables the managers to filter out information that they don’t need, thereby reducing the time it takes to refresh the document, and the volume of data returned from the database. This type of document is also referred to as an interactive document.
- If you didn’t enter the values that you want to focus on when you send the document, Broadcast Agent would not be able to refresh it at the scheduled time. Prompts require that you manually enter values. Because Broadcast Agent refreshes the document on a server machine, when you are not there, you cannot enter the values at refresh time.

In conclusion, BusinessObjects prompts you to enter the values you want when you send the document, not when Broadcast Agent refreshes the document. So, when the Enter or Select Values dialog box appears when you send a document to Broadcast Agent:

1. Click Values.

2. In the dialog box that appears, select the values you want and click OK.

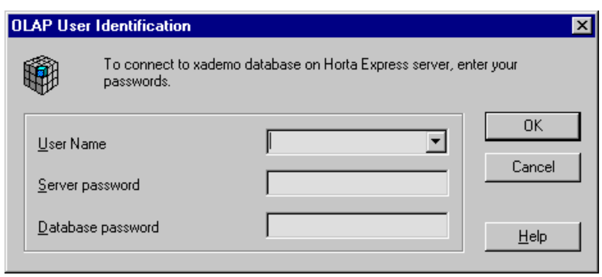
3. Click OK in the Enter or Select Values dialog box.

Note: This feature was not available in BUSINESSOBJECTS 4.1. For information on enhancements such as these, refer to “Enhancements Over Document Agent Server” on page 297.

What to do if the OLAP User Identification dialog box appears

If the document that you are scheduling contains OLAP data providers, the OLAP User Identification dialog box appears when you click OK in the Send Documents to Broadcast Agent dialog box.

The OLAP User Identification dialog box prompts you to enter your OLAP security information. The fields that you have to fill in depend on the server. Here’s an example of the dialog box, where the data provider is built on Oracle Express.



Complete all the fields, in this case the user name, server password and database password. These are the same user name and passwords that you enter in the wizard when you build OLAP data providers in BUSINESSOBJECTS.

When BROADCAST AGENT processes your document, it uses the user name and passwords that you entered in the OLAP User Identification dialog box, to connect to your corporate database, and bring back the data you need. For information about limitations on scheduling documents containing OLAP data providers, refer to “Does the document contain OLAP data providers?” on page 290.

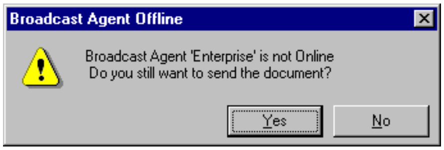
What if Broadcast Agent is offline or unable to process BusinessObjects documents?

When you click OK in the Send Document to Broadcast Agent dialog box, a message entitled Broadcast Agent Offline may appear on your screen. There are two cases:

- BROADCAST AGENT is not online
- BROADCAST AGENT is online but is unable to process BUSINESSOBJECTS documents.

Broadcast Agent is not online

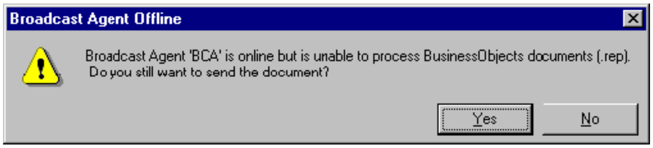
This message indicates that BROADCAST AGENT is not running on the server:



This is not a problem. BROADCAST AGENT is automatically launched when documents are due for processing. If you want to find out how this works, refer to the *Broadcast Agent Administrator's Guide*.

Broadcast Agent is online but is unable to process BusinessObjects documents

This message indicates that the BROADCAST AGENT you selected can only process WEBINTELLIGENCE documents:



To enable processing of BUSINESSOBJECTS documents, your BROADCAST AGENT administrator has to switch on the *BusinessObjects documents* parameter in the Administration Tool.

You can still send the document, provided that the administrator changes the parameter before the first scheduled processing time that you set. If this is not possible, have the administrator change the parameter, then send the document again.

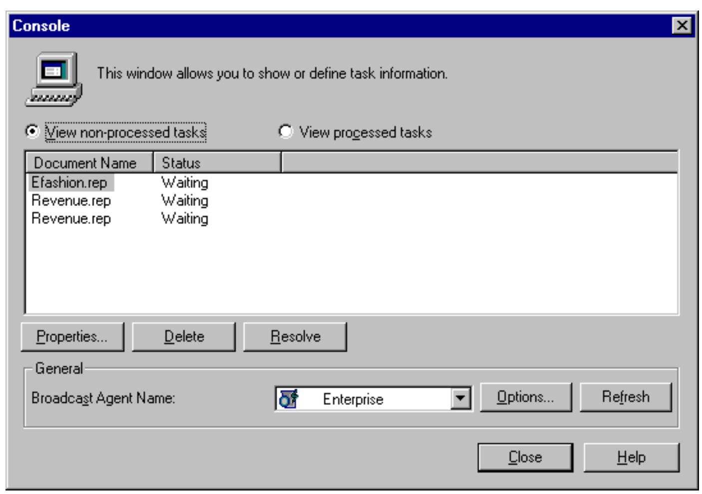
For information on setting BROADCAST AGENT parameters on the server side, refer to the *Broadcast Agent Administrator's Guide*.

Can you change the options for a document you have sent?

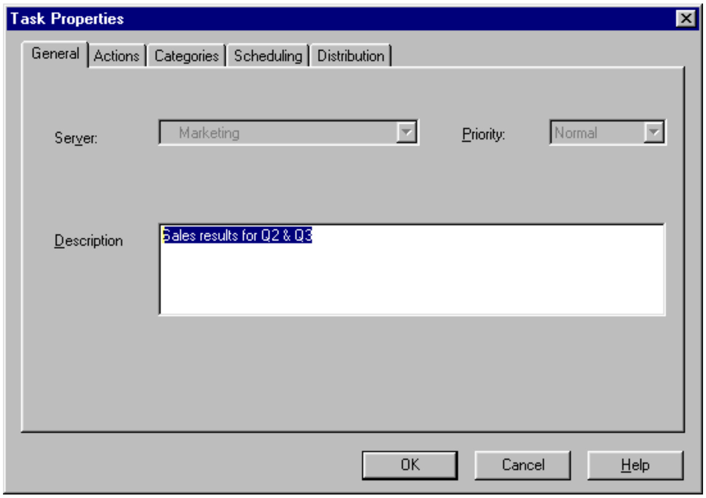
Imagine you sent a document to BROADCAST AGENT, chose to distribute it via the BUSINESSOBJECTS repository, then realized that you forgot to add your boss to the list of document recipients. Or what if you want to change the schedule, for example to have BROADCAST AGENT process the document right away?

You don't have to send the document again. You can change the scheduling and distribution options for a document that you have already sent to BROADCAST AGENT, thanks to the Broadcast Agent Console. You can also change the description of the document. Here's how to do it:

1. In BUSINESSOBJECTS, select the Console command on the Tools menu.
The Broadcast Agent Console appears.



2. Click the document that you want to modify, then click Properties. The Task Properties dialog box appears.



- The Properties dialog box contains the same tabs as the Send Document to Broadcast Agent dialog box (illustrated on page 236): General, Actions, Categories, Scheduling and Distribution.
- You can view the options that you selected in each tab, but you can only change the document description (General tab), categories, scheduling and distribution options. You cannot change the actions set in the Actions tab. If you do want to change the actions for a document, you have to schedule it again using the Send To>Broadcast Agent command.

3. To add or change comments about the document, write in the Description box (General tab).

4. To change the document's scheduling options, click the Scheduling tab.
   - You can use all the scheduling options (Time Scheduler, File Watcher etc.) in the Properties dialog box.
   - Refer to "When will Broadcast Agent process the document?" on page 242 for information on how to use these.

5. To change the distribution options, click the Distribution tab. You can:
   - To change the list of document recipients, click the To button under *Distribute via the BusinessObjects Repository*.
   - To distribute the document on the server, click *Distribute via the Server File System*, then click Browse to select a folder.
   - You cannot use the *Distribute via Web Server* option from the Properties dialog box.

6. Click OK to return to the Console.

Tip: For information on using the Console to monitor the documents you have sent to BROADCAST AGENT, refer to "Monitoring Your Documents" on page 275.

Scheduling Corporate Documents

You can schedule documents that you want to publish across your enterprise or organization, via the BUSINESSOBJECTS repository. These are *corporate documents*.

Who gets the corporate documents that you schedule?

You select the groups of users that will be able to view and download the documents. With scheduled corporate documents, you can select only groups of users, not individual users.

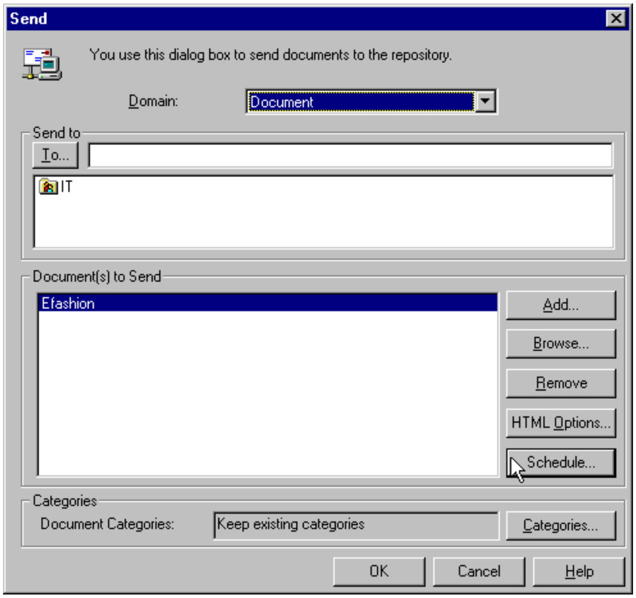
What scheduling features are available for corporate documents?

When you schedule corporate documents, you benefit from many of the document scheduling features described in "BROADCAST AGENT At A Glance" on page 229. Here is the list of features that are *not* available for corporate documents:

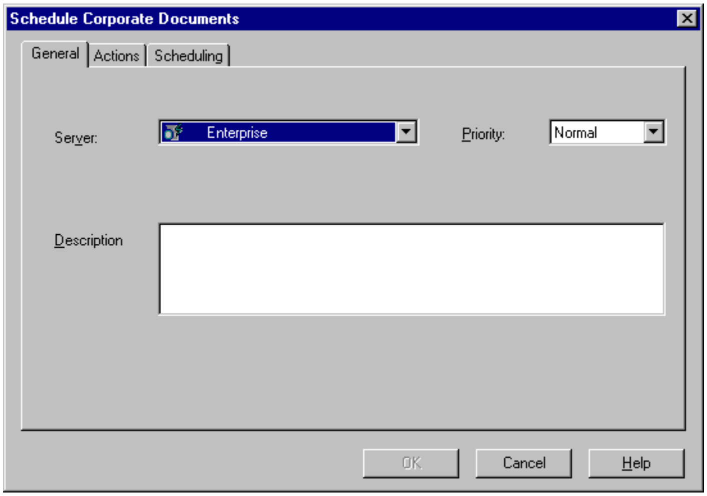
- Report bursting
- Condition evaluation
- Distribution via the server's file system
- Distribution via a Web server that you specify. (You can distribute corporate scheduled documents via the Web, for INFOVIEW users).

To schedule corporate documents

1. Follow the procedure for "Publishing Corporate Documents" on page 219.
2. In the Send dialog box, click Schedule.



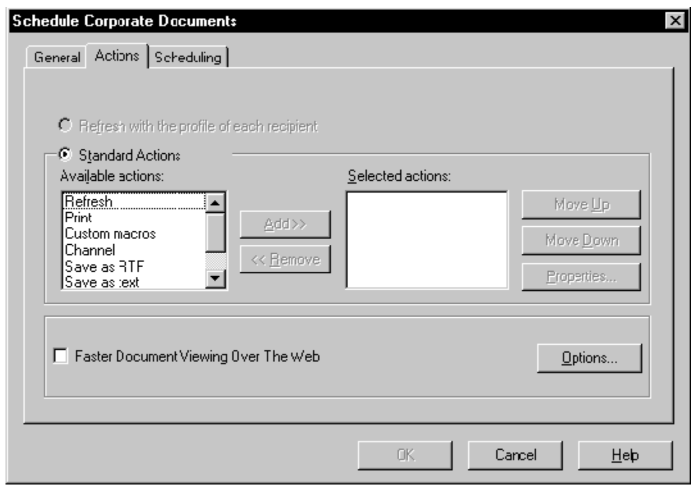
The Schedule Corporate Documents dialog box appears.



3. In the General tab, select the server and the document's priority. Write a description of the document to help people understand its content, if you wish.

4. In the Actions tab, select the tasks that you want BROADCAST AGENT to perform on your document.
   For more information on using the Actions tab, refer to "What do you want Broadcast Agent to do to your document?" on page 237.

5. Still in the Actions tab, select *Faster Document Viewing Over The Web* to make it faster for INFOVIEW users to view the document in their Web browser.



   Click Options to select the document format you need for web users. The three categories are:
   - *Enhanced Document Format* speeds up document viewing in the BUSINESSOBJECTS report viewer.
   - *Standard HTML Format* speeds up document viewing in native HTML.
   - *Optimize for PDF Viewing* speeds up document viewing in PDF format.

   Refer to "Viewing BusinessObjects documents in InfoView" on page 74 for more information on the different ways of viewing BUSINESSOBJECTS documents in INFOVIEW.

6. In the Scheduling tab, set the times and/or intervals at which you want BROADCAST AGENT to process your document.
   For more information on using the Scheduling tab, refer to "When will Broadcast Agent process the document?" on page 242.

7. Click OK.
   You return to the Send dialog box, where you click OK to send the document to BROADCAST AGENT.

To change or unschedule a scheduled corporate document

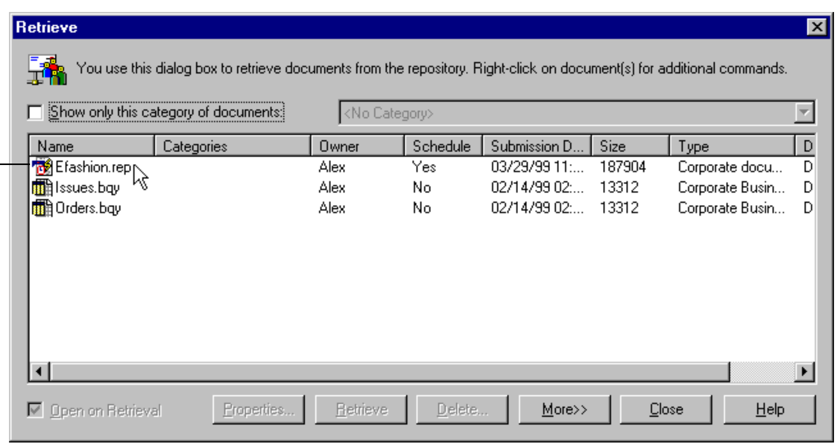
You may wish to change the schedule of a corporate document, or remove the scheduling options that you set. For example, if BROADCAST AGENT processes a document every Monday, you can choose a different day of the week, or change the frequency to hourly or monthly. You can also activate or switch off the File Watcher feature, which triggers processing only when another file is present on the server.

When you change the schedule of a corporate document, you can use options to speed up document viewing in INFOVIEW, over the Web.

To change or unschedule a scheduled corporate document:

1. Select the Retrieve From>Corporate Documents command on the File menu.
   The Retrieve dialog box appears. The icon for scheduled documents is shown here:

This is the icon for scheduled documents.

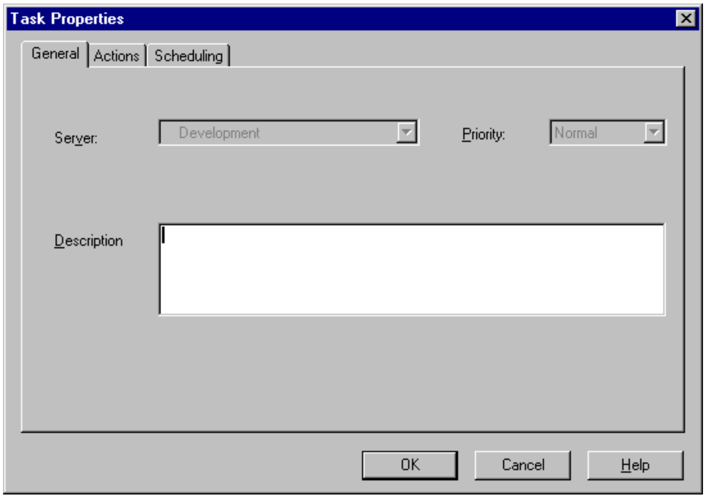


2. Click the document name with your right mouse button.

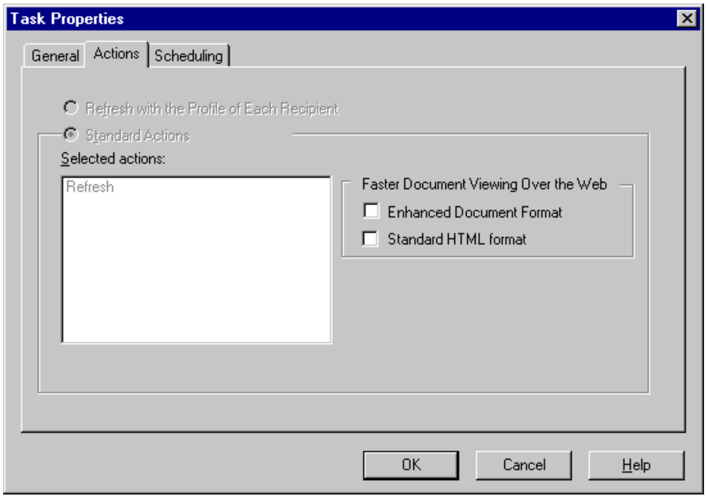
3. On the pop-up menu that appears, select:
   - *Change Schedule* to have BROADCAST AGENT process the document at different times or intervals. Go to step 4.
   - *Unschedule* to remove the scheduling options that were set when the document was sent to BROADCAST AGENT.

In this case, the document remains as a corporate document on the repository, but will not be processed by BROADCAST AGENT from now on. If you change your mind and want to schedule the document again, you have to start over by resending it to BROADCAST AGENT.

4. If you clicked Change Schedule, the Task Properties dialog box appears.



5. Click the Actions tab.



6. Use the options in the Actions tab to speed up document viewing over the Web, for INFOVIEW users:
   - *Enhanced Document Format* is for the BUSINESSOBJECTS report viewer.
   - *Standard HTML Format* is for native HTML.

   Refer to “Viewing BusinessObjects documents in InfoView” on page 74 for more information on the different ways of viewing BUSINESSOBJECTS documents in INFOVIEW.

7. Use the options in the Scheduling tab to set the new schedule.
   - For information on the options in this tab, refer to “When will Broadcast Agent process the document?” on page 242.
   - When you click OK, you return to the Retrieve dialog box.

8. Click Close.
   BROADCAST AGENT will now process the document at the new times or intervals that you set.

Finding Processed Documents on the Repository

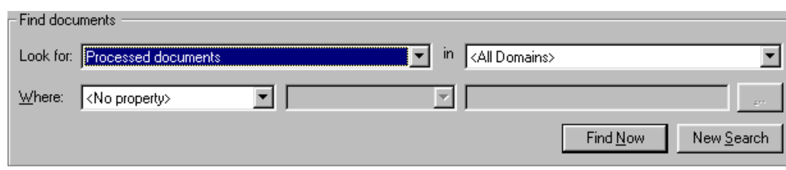
Using the Find Documents feature you can search for documents according to criteria that you set. One of the options is *Processed documents*, i.e., documents that BROADCAST AGENT has successfully processed and distributed to you via the repository.

To find processed documents:

Find Documents

1. Click the Find Documents button on the File menu.
   The Find Documents dialog box appears.

2. In the Find Documents box, set the *Look for* option to *Processed documents*.



3. Click Find Now.
   Only the documents that BROADCAST AGENT has successfully processed and distributed to you are now listed in the dialog box.

4. Select the document(s) that you want to retrieve, then click Retrieve.

Note: For detailed information on using the Find Documents feature, refer to "Using search criteria to find published documents" on page 201.

Chapter 11 Advanced Document Scheduling and Troubleshooting

In this chapter

Overview

This chapter will help you get the most out of working with BROADCAST AGENT and BUSINESSOBJECTS. It includes:

- Useful suggestions, including report bursting
- Information about customized processing with VBA macros
- How to monitor your documents with the Broadcast Agent Console
- Everything you need to know about condition evaluation and document processing
- A Troubleshooting section

For the basics of automated document processing with BROADCAST AGENT, see Chapter 10 "Scheduling BusinessObjects Documents" on page 227.

Troubleshooting information in this chapter

This chapter describes the problems you may encounter when sending documents from BUSINESSOBJECTS to BROADCAST AGENT. It provides the following information:

- How to process a document when you've used your login password for the connection to the corporate database, but the password for the database connection has changed.
- Report bursting limitations.
- Avoiding problems before sending your document.
- Error handling, including using VBA macros to define your own error messages.
- BROADCAST AGENT features that fix problems that occurred with DOCUMENT AGENT SERVER.

Where you can get more information

You can find information on troubleshooting BROADCAST AGENT on the server side in the *Broadcast Agent Administrator's Guide*. Also, all error messages returned by BROADCAST AGENT are described in the *Error Message Guide*.

Document Scheduling Tips and Tricks

BROADCAST AGENT is packed with features that you can combine to optimize the way you process and distribute documents. This section covers:

- Report bursting -- sending one document which BROADCAST AGENT then distributes according to the profile of each recipient. This ensures that recipients see only the data that their user profile allows.
- Printing a processed document on different printers in different locations.
- Personal document processing: using BROADCAST AGENT to process documents that you send back to yourself only.
- Posting versions of a processed document in different file formats on different file servers.
- Using a condition to trigger processing, then publishing the document over the Web.
- Report chaining: automatically starting one process when another one ends.
- Automated channel publishing.
- Protecting processed documents with passwords.
- Handling errors by using custom macros.

Report bursting

If you're a power user with rights to all types of documents and database connections, you may not want all the people on the distribution list for a document you're sending to see the same information as you.

Report bursting lets you automatically generate a version of a document based on the *profile* of each person who will receive it.

BUSINESSOBJECTS supervisors set up user profiles. Profiles are the sum of access rights a user has, such as how many rows of data each user can view, which database connections are available to which users, which universes, and so on.

By setting one simple option in the Send Document to Broadcast Agent dialog box, you ensure that the document you're sending will be sent with each recipient's user profile, not with *your* profile.

Here's an example of report bursting that shows how you can distribute different information to different people from just one document.

Example

Report bursting

Supervisors can place restrictions on the universes that BUSINESSOBJECTS users work with. In this example, the supervisor has set up a group of users, where:

- Maria and Tom can use universes but only retrieve 500 rows.
- Janis and Frank can use universes but retrieve up to 1000 rows.

You belong to the same user group, but you are a power user with the right to retrieve as many rows as queries return. You can create a document with a query on a universe, then, thanks to report bursting with BROADCAST AGENT, send the document once but distribute different versions of it to the other members of your user group.

To create and send a document according to each recipient's user's profile:

1. Create a new document and build a query on a universe.

Send To Broadcast Agent

2. Save the document, then click the Send to Broadcast Agent button on the Document Exchange toolbar.
3. In the Actions tab, select *Refresh with the Profile of Each Recipient*.
4. In the Distribution tab, click To, then select your user group in the Select Users and Groups dialog box.
   Note that, when you use report bursting, the only way you can distribute the document is via the repository.

5. Set the scheduling parameters in the Scheduling tab, then click OK.
   BROADCAST AGENT:
   - Makes a copy of the document for each recipient.
   - At the specified time, refreshes each copy with the profile of each recipient. Maria and Tom's document contains up to 500 rows, while Janis and Frank's document contains up to 1000 rows. Your copy of the document contains the full query result.

Can you use Overwrite Mode with report bursting?

Report bursting can generate large number of documents very quickly. A separate copy of the document you send is made for each recipient. So, if you "report-burst" a document to 50 people once a day, that's 250 copies of the document generated per week.

With report bursting, you cannot use the *Overwrite mode* option in the Distribution tab in the Send Document to Broadcast Agent dialog box. Therefore, if you use report bursting in your organization, your BROADCAST AGENT administrator should allocate server space accordingly.

Printing a document on different printers

One of the best BROADCAST AGENT features is printing. When you set your document to refresh and print at night, there's a copy waiting for you in your office in the morning.

BROADCAST AGENT is not restricted to the default printer -- it lets you select the printer you want to use. So, if you set two print actions for the same document, you can print the document twice but in different locations, in different branches of your company, for example.

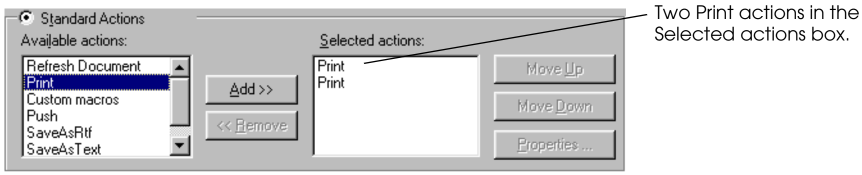
> The printers that you use with BROADCAST AGENT must be installed for your computer, and for the server machine where your administrator has installed BROADCAST AGENT.

To print a document on different printers with BROADCAST AGENT:

Send To
Broadcast Agent

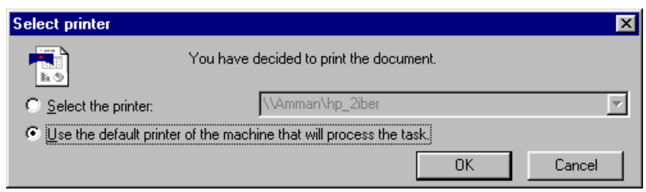
1. Click the Send to Broadcast Agent button on the Document Exchange toolbar.
2. In the Actions tab, click Standard Actions.
3. In the Available Actions list, click Print, then click Add.

4. Repeat the previous step.
   The Print action is now listed twice in the Selected actions box.



   You can now specify which printer to use for each print job.

5. Click the first Print item in the Selected actions box, then click Properties.
   The Select printer dialog box appears.



6. Click *Select the printer*, then select the printer you want in the drop-down list.
   Click OK to close the dialog box.

7. Repeat the previous step for the second print job.
   - The default printer of the BROADCAST AGENT machine will be used if you do not follow this step.
   - When you send the document, BROADCAST AGENT server will print it on the printers you specified.

Personal document processing

A lot of attention in this guide is paid to enterprise-wide information publishing with BROADCAST AGENT. Did you know that BROADCAST AGENT can also automatically process documents just for you? Here's how:

Send To Broadcast Agent

1. Click the Send to Broadcast Agent button on the Document Exchange toolbar.

2. In the Distribution tab:
   - Switch on *Distribute via the Repository*
   - Switch on *Add my name to the list.*

3. Set the other options you want in the different tabs, then click OK.
   BROADCAST AGENT will send the processed document only to you.

Publishing a document in rtf, text, and pdf formats on different servers

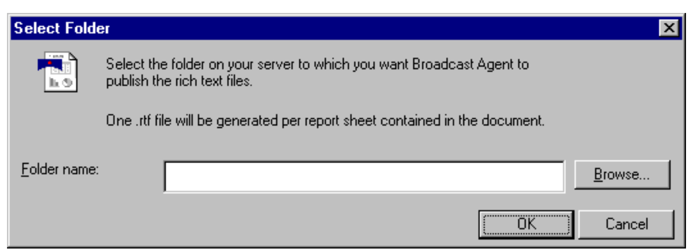
BROADCAST AGENT can save documents in text, rtf, and pdf formats (as well as HTML and BUSINESSOBJECTS .rep formats, of course.)

When you choose the Save as text, Save as rtf, or Save as pdf actions for a document, you can also select the folder where BROADCAST AGENT will publish the processed document. This means that you can publish a document in different formats on different servers. Here's the procedure:

Send To Broadcast Agent

1. Click the Send to Broadcast Agent button on the Document Exchange toolbar.
2. In the Standard Actions box of the Actions tab:
   - Double-click Save As RTF.
   - Double-click Save As Text.
   - Double-click Save As PDF.

   These actions now appear in the Selected Actions box.
3. In the Selected Actions box, click Save As RTF, then click Properties. The Select Folder dialog box appears.



4. Specify the folder where you want the rich text file to be posted, then click OK.
5. Repeat steps 3 and 4 for the Save As Text and Save As PDF action.
6. Set the other options you want in the different tabs, then click OK. BROADCAST AGENT will publish rtf and text versions of your BUSINESSOBJECTS document in the folders you specified.

Reminder: Using BROADCAST AGENT to generate RTF versions of BUSINESSOBJECTS documents can result in very large files. For example, an 800-page BUSINESSOBJECTS document results in a 50Mb RTF document.

Condition-based publishing over the World Wide Web

The most dynamic way of publishing information today is over your corporate intranet, extranet, or the World Wide Web. When you combine this technology with condition-based processing, where information is only published if the data fits criteria that you set, the possibilities are endless.

For example, you want to use BROADCAST AGENT to publish a document over the Web. BROADCAST AGENT takes care of the scheduling (i.e., when the document is refreshed), the conversion to HTML, and lets you specify the location of your Web server. Add to that the condition that BROADCAST AGENT will only refresh the published information if the numbers change in a way that you decide, and you have a totally automated process. Here's an example.

Example

I only want to refresh my Web page if revenue falls below $100 000

Your project is to find out why revenue drops below $100 000 in some cities in some time periods. So, you only want to see documents where revenue is low.

You can have BROADCAST AGENT send you the document if the condition

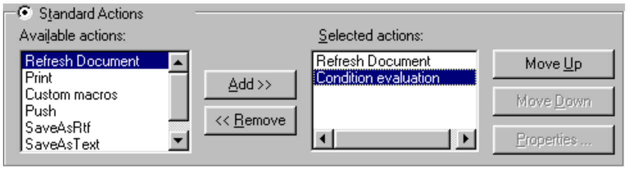
```
Revenue<$100 000
```

is met. If Revenue is above the amount specified in the condition, BROADCAST AGENT will not send you the document.

To do this:

1. Send the document to BROADCAST AGENT by following "First steps" on page 236.
2. Click the Actions tab.
3. In the Standard Actions box, double-click Refresh.
4. Click the Editor button in the Conditions group box.
   The Formula Editor appears.
5. Define the formula as illustrated here:

6. Click OK in the Formula Editor.
   In the Send Document to Broadcast Agent dialog box, the following actions are now set:



   The order of the actions means that BROADCAST AGENT will first refresh the document, but will not continue processing it if revenue has not fallen below $100 000.

7. Set the scheduling and distribution options, then click OK.

What happens if the condition isn't met?

If a condition isn't met, BROADCAST AGENT stops processing the document. The error message *Condition not met* appears in the Broadcast Agent Console. For information on using the Console to trace errors, see "Viewing errors in the Broadcast Agent Console" on page 295.

Starting a new task when another task ends

BROADCAST AGENT supports event-based processing, whereby a new task begins when and only when a previous task has been successfully processed. You benefit from this feature by using the *File Watcher* check box in the Scheduling tab, where you specify a file that must be present before BROADCAST AGENT can process the document you are sending.

A typical example of using this feature is the DBA who posts a text file to signal the successful reload of a data warehouse; when the text file is present, BROADCAST AGENT processes your document.

Regular business users can also gain from using the File Watcher. Let's imagine you want BROADCAST AGENT to process and distribute one document only if a previous document has been successfully refreshed. You can do this by combining the File Watcher feature with the text and rtf formats that BROADCAST AGENT now supports. The result is report *chaining*, which enables you to process your reports in an unbreakable sequence.

Example **Testing a database connection before processing a large document**

You've been experiencing database connection problems when sending documents to BROADCAST AGENT. What's more, the documents you send are large, which means that you don't want processing to start unless you're sure that the connections are working OK.

You can combine the File Watcher and save as text features to test the connection before processing a large document. You send a "dummy" document which uses the same database connections as your real documents, i.e., it contains a simple query on the same universe but takes much less time to refresh. When BROADCAST AGENT has successfully refreshed the dummy document, it can save it as a text file, which then triggers the processing of a large document. BUSINESSOBJECTS deletes the text file every time the main task starts.

Sending the dummy document to test the connection

First, you test the connection like this:

1. Send the dummy document to BROADCAST AGENT (Send To>Broadcast Agent command, File menu).
2. In the Actions tab, click Standard Actions.
3. Double-click Refresh, then double-click Save As Text.
   These two actions now appear in the Selected Actions box. Make sure that Refresh appears above Save As Text: the actions are performed in the order in which they appear.
4. In the Selected Actions box, click Save As Text, then click Properties.
   The Select Folder dialog box appears.
5. Specify the folder where the text file will be stored, and make a note of it (you'll need it when you set up the File Watcher feature later).
6. In the Scheduling tab
   - Switch on *Time Schedule*.
   - Switch off *File Watcher*.

7. Set up the time scheduling parameters that you want for the real document, then click OK.
   At the time or intervals you specified, BROADCAST AGENT will refresh the dummy document, then place the text file in the folder you specified. If the database connection fails, BROADCAST AGENT will not refresh the document, and therefore will not save the document as a text file. Thus, the real task will not start unless the connection **is** working.

Setting up the File Watcher for the real document

Here's how to set up your real document so that BROADCAST AGENT refreshes then publishes it once the database connection has been tested:

1. Send the document to BROADCAST AGENT (Send To>Broadcast Agent command, File menu).

2. In the Scheduling tab:
   - Switch off *Time Schedule*.
   - Switch on *File Watcher*.

3. In the *File to watch for* field, specify the path to the server folder that will contain the dummy text file, and include the file name, e.g.,

   ```
   \\taipei\My Documents\myreport.txt.
   ```

   where taipei is the name of the server, My Documents is the folder, and myreport.txt the name of the file to watch for. For information on the syntax of the path you specify, refer to "How do you indicate where to find the file in the Scheduling Options dialog box?" on page 132.

4. Switch on *Delete the file each time the task starts*.
   The File Watcher group box now looks like this:

5. In the Distribution tab, set the way you want to publish the document, then click OK.
   BROADCAST AGENT will only refresh and publish your large document if the dummy file has been successfully processed. Also, because the text file will be deleted every time BROADCAST AGENT processes the large document, you can set up regular processing knowing that the task will not start unless the database connection is working.

Automatic channel publishing

A "channel" is a Web site designed to deliver content from the Internet to your computer. You subscribe to a channel using Microsoft Internet Explorer, and can choose to have the information on the channel brought to you every time it changes.

Scheduled processing and channel publishing make a powerful combination:

- You use BROADCAST AGENT to process your documents and publish them on a channel.
- With Microsoft Internet Explorer, Web users subscribe to that channel.
- The information that BROADCAST AGENT generates is automatically communicated over the Web to the channel subscribers.

To automate channel publishing:

1. Send the document to BROADCAST AGENT by following "First steps" on page 236.
2. Click the Actions tab.
3. In the Standard Actions box, double-click Channel.
   The Publish to Channels dialog box appears.
4. Select the channel, then click OK.
5. Click OK in the Send Document to Broadcast Agent dialog box.

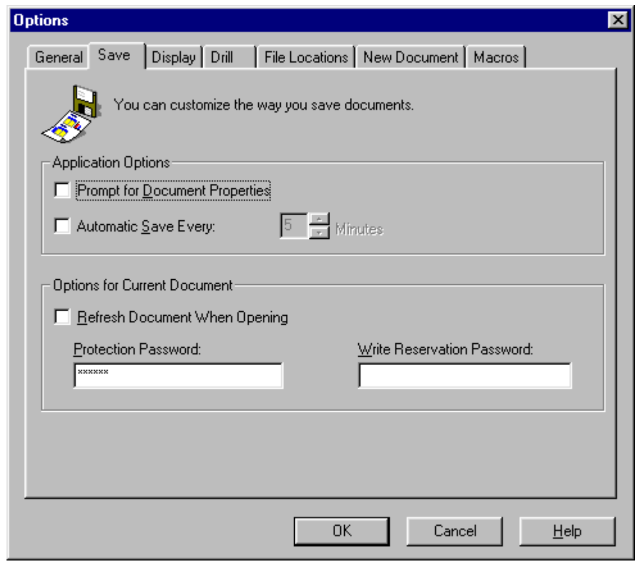
Protecting processed documents with passwords

You can protect all your BUSINESSOBJECTS documents with passwords, even when you work with BROADCAST AGENT.

When BROADCAST AGENT launches BUSINESSOBJECTS on the server to process the document, you are not around to enter your password. At that point, the document's password is ignored so that BROADCAST AGENT can successfully process the document. However, users cannot retrieve a password-protected document from the repository without entering the password.

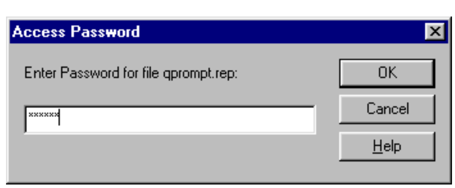
To set up password protection for a document that you want to process with BROADCAST AGENT:

1. Open the document then select the Options command on the Tools menu.
2. Click the Save tab, then type the password in the Protection Password box.

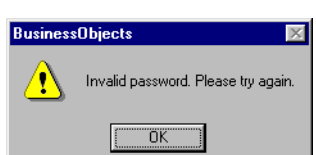


3. Click OK then confirm the password in the dialog box that appears.
4. Save the document then send it to BROADCAST AGENT.

When BROADCAST AGENT has processed the document, users who retrieve it have to type their password in the Access Password dialog box.



If the password is wrong, BUSINESSOBJECTS denies access to the document.



Monitoring Your Documents

In BUSINESSOBJECTS, you can view the progress of the documents you have sent to BROADCAST AGENT by running the BROADCAST AGENT Console. You can also use the Console to:

- See which documents have been successfully processed.
- Check information about the documents in process, such as their start and expiration dates.
- Get information on task failure so that you can fix errors that have occurred.
- Change task properties and delete tasks.

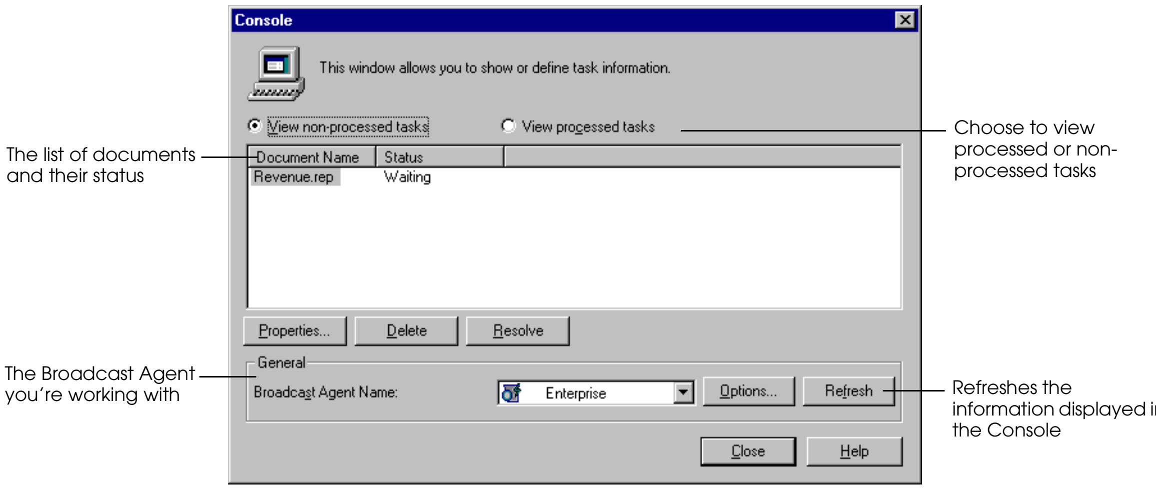
Note: When you run the Console in BUSINESSOBJECTS, you monitor only the documents that you have sent to BROADCAST AGENT. If you run the Console as an application on the server, you can view and manage all the documents that BROADCAST AGENT is handling.

For more information on working with the Console on the server, see the *Broadcast Agent Administrator's Guide*.

Opening the Broadcast Agent Console

To open the Console:

- Select the Console command on the Tools menu.

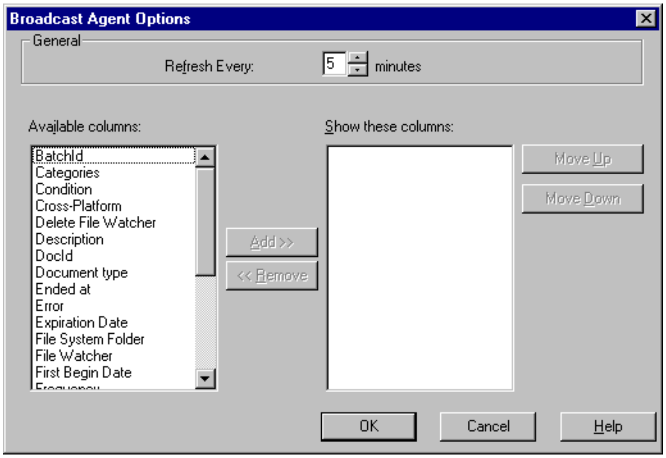


Changing the Console's display settings

The Console provides information about documents that you have sent to BROADCAST AGENT. This information is displayed in columns in the Console, and by default, the only columns you see are Document Name and Status. However, BUSINESSOBJECTS lets you view a lot more information about waiting or processed documents.

To view this information, you add columns to the Console display. You can also determine how often the information that appears in the Console is refreshed. Here's the procedure:

1. Open the Console, then click the Options button.
   The Broadcast Agent Options dialog box appears.



The Available Columns box lists all the columns of information that you can displaying the Console.

Many of the columns display information about the settings you chose when you sent the document to BROADCAST AGENT. Unless specified otherwise, the tabs referred to in the following table are in the Send Document to Broadcast Agent dialog box:

Use this column...	To display this information in the Console...
BatchId	An identifying number that BROADCAST AGENT assigns to a task.
Categories	The categories assigned to a document.
Condition	The formula the user set when sending the document by using the Condition option in the Actions tab.
Cross-Platform	Whether or not the BUSINESSOBJECTS supervisor chose to process documents on a Windows-only BROADCAST AGENT (No), or on any platform (Yes).
Delete File Watcher	Whether or not the user set the *Delete the file each time the task starts* option (Scheduling tab).
Description	The description of the document that the user entered in the General tab.
DocId	An identification number that BROADCAST AGENT assigns to a document. One document may have many BatchIds and ProcessIds.
Document Type	Indicates whether the document is from BUSINESSOBJECTS or WEBINTELLIGENCE.
Ended At	The date and time at which BROADCAST AGENT last finished processing the document.
Error	An error message that the server returns if the task fails.
Expiration Date	The expiration date that the user set in the Scheduling tab.
File System Folder	The folder specified for distributing the document via the server's file system.

Use this column...	To display this information in the Console...
File Watcher	The path to the file specified in the File Watcher option (Scheduling tab).
First Begin Date	The starting date that the user set in the Scheduling tab.
Frequency	The intervals at which BROADCAST AGENT will process the document - hourly, monthly, etc.
Host Name	The name of the machine on which BROADCAST AGENT will process or has processed the document.
HTML Folder	The folder specified for distributing the document via the World Wide Web.
Macro Info	Description of VBA macros attached to a document.
Next Schedule	The date and time at which BROADCAST AGENT will next process the document
Overwrite Mode	Whether or not the newly processed document will overwrite the previous version. Corresponds to the Overwrite Mode option in the Distribution tab.
Owner	The name of the user who sent the document.
Priority	The priority the user set (Normal, High, Low).
ProcessId	An identification number that the server's operating system assigns to a task. Useful if you want to manage tasks at the server level.
Size	Document size in kilobytes.
Started At	The date and time at which BROADCAST AGENT last started processing the document.
Submission Date	The date the document was sent.

2. To add columns to the Console, hold down the Ctrl key, click the columns that you want, then click Add.
3. Use the Move Up and Move Down keys to determine the order in which the information appears in the Console.

4. To remove information from the Console, hold down the Ctrl key, make your selection in the Show These Columns box, then click Remove.

5. Enter a value in the Refresh Every box, to determine how often information in the Console is refreshed.

6. Click OK to return to the Console.

Tip: Click a column heading to sort the information displayed. For example, to sort tasks by ProcessId, click the ProcessId column heading.

What does the Resolve button do?

The Resolve button in the Broadcast Agent Console enables you to resubmit a task that has failed due to a database connection error. For more information, see “Resolving Database Connection Failure” on page 286.

Broadcast Agent and Condition Evaluation

Condition evaluation is a BROADCAST AGENT feature that allows you to process a BUSINESSOBJECTS document based on the result of a calculation in BUSINESSOBJECTS. A typical scenario is:

- You want to distribute a document to a group of users only when a significant event occurs, such as a drop in revenue.
- You manage this distribution automatically with BROADCAST AGENT by requesting that the document be refreshed if a condition is true, for example that revenue drops below a given sum. In concrete terms you use the *Condition Evaluation* feature in the Actions tab of the Send Document to Broadcast Agent dialog box, using a formula such as

```
=<Revenue><100000
```

- BROADCAST AGENT refreshes the document according to the schedule that you set. In the refreshed document, BUSINESSOBJECTS updates the results of your formula. What happens next depends on the result:

If the result of the formula is...	Then...
True, i.e., Revenue actually does drop below $100,000	BROADCAST AGENT distributes the refreshed document.
False	• BUSINESSOBJECTS closes the document without saving it. • BROADCAST AGENT does not distribute the document, but waits till it is next due for processing. • The *Condition not met* error message appears in the Console.

Refer to "Condition-based publishing over the World Wide Web" on page 269 for an example of condition evaluation.

Guidelines for condition evaluation

The guidelines in this section are designed to help you benefit fully from condition evaluation with BROADCAST AGENT. They cover:

- Where to place the condition evaluation in the list of actions you want BROADCAST AGENT to perform
- The types of formulas you can use

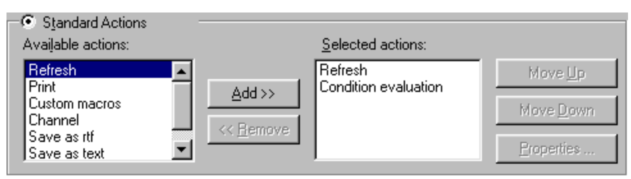
- Advanced calculation information about contexts, and how to get value-specific results using the WHERE operator.

Refreshing the document before evaluating the condition

Condition evaluation lets you automatically distribute information based on changes in your business data. The trick is to ensure that BROADCAST AGENT refreshes your document *first*. If you set up the document so that the condition evaluation takes place before the document is refreshed, you're unlikely to get the results you want.

In the Actions tab in the Send to Broadcast Agent dialog box, set the Refresh action *before* you define the formula for the condition evaluation. To do this:

1. In the Standard Actions dialog box, click Refresh.
   Refresh is listed twice in the Selected actions box.
2. In the Condition box, click Editor.
3. Define your condition in the Formula Editor, then click OK.
   Condition Evaluation appears below *Refresh* in the Selected Actions box.



What types of formula can you use for condition evaluation?

- The first variable in your formula must be a measure, such as Revenue. If the formula is based on a dimension, for example

  ```
  =<Customer>="Arai"
  ```

  you will get an error.
- If you want to use a variable as the condition to be evaluated, it too must be a measure.
- The result of the formula must be Boolean, i.e., either true or false. For example,

  ```
  =Revenue>100000
  ```

  works because the result is either true (over 100,000) or false (below 100,000).

Calculation contexts and condition evaluation

By default, formulas that you define as conditions when sending a document to BROADCAST AGENT are calculated at the report level. In other words, even if you use the keywords Block and Body in BUSINESSOBJECTS extended calculation syntax, BROADCAST AGENT evaluates the formula is calculated as if the Report keyword were used.

The result is a value based on the entire report, not a particular dimension or set of dimensions. (For detailed information on using keywords in formulas, see the *BusinessObjects User's Guide*.) Here's an example.

Example **Broadcast Agent condition evaluation at the report level**

You use the following formula as the condition for a document you are sending to BROADCAST AGENT:

```
=Sum(<Revenue>) In Body
```

where the only dimension in Body is City. However, the document also contains the Region dimension, which is displayed at the section level.

Thus, the result of the calculation evaluated when BROADCAST AGENT processes the document will be the grand total revenue for all cities and all regions. The Body keyword is totally ignored.

Testing the formula before sending the document

Before sending a document to BROADCAST AGENT, you can test the formula in a cell inserted in the general section of the report. Formulas inserted in the general section are evaluated with the respect to the whole report, which is exactly what will happen when you send your document to BROADCAST AGENT.

The idea is to check whether the formula returns the result that you want. If it does, you can use the formula when you send the document to BROADCAST AGENT.

Note: You need BUSINESSOBJECTS REPORTER to perform this task.

Here's the procedure:

1. Open the document that you want to send to BROADCAST AGENT.
2. Make sure that the Formula Bar is displayed. If it isn't, select the Formula Bar command on the View menu.

3. At the very top of the report on which the calculation will be made, insert a cell:
   - Select the Cell command on the Insert menu.
   - With your mouse, draw the cell area at the top of the report.
4. Click inside the new cell, then click inside the Formula Bar.
5. Type = then type the formula.
6. Press Enter.
   The result of the formula appears in the cell.

Getting value-specific results for condition evaluation

Despite the fact that BROADCAST AGENT evaluates formulas at the report level, you can create value-specific formulas using the WHERE operator. Here's an example:

Example **Publishing a document when you hit your sales volume targets**

Using the WHERE operator, you can define a formula such as

```
=<Quantity Sold> Where (<Product Color>="Blue")>5000
```

BROADCAST AGENT will only publish the document if the number of blue products sold goes over 5000.

Restrictions on value-specific formulas

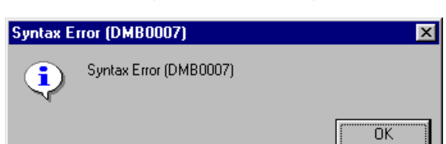
When you type your formula for the condition evaluation, and you can specify values from different variables using AND, like this:

```
=<Revenue> Where ((<Year>="FY95") AND (<Resort>="Hawaiian
Club"))>100000
```

However, AND is the only operator that you can use. If you try to use OR, <> or NOT, for example

```
=<Revenue> Where ((<Year>="FY95") OR (<Resort>="Hawaiian
Club"))>100000
```

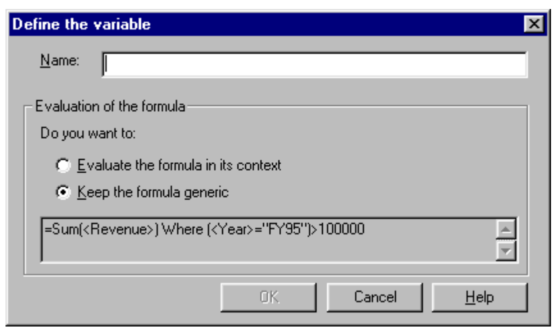
the following error message appears:



How to get around this problem

Create a variable from your formula before you send the document to BROADCAST AGENT. Then, all you have to do is use the variable in the condition formula. Here's how to do it:

1. In BUSINESSOBJECTS, make sure the Formula Bar is displayed. If it is not, select the Formula bar command on the View menu.
2. Insert or click inside a blank cell in the report.
3. Type the formula that you want to use as the condition, then press Enter. A 1 appears in the cell in the condition is true, 0 if it is false.
4. Select the Define as Variable command on the Data menu. The Define as Variable dialog box appears.



5. Type a name for the variable in the Name box.
6. Use the option *Keep the formula generic*, then click OK.

When you send the document to BROADCAST AGENT:

1. Click the Editor button in the Actions tab of the Send Document to Broadcast Agent dialog box.
2. In the Formula Editor that appears, double-click the name of the variable that you created.
3. Complete the formula, then click OK.

Resolving Database Connection Failure

In BUSINESSOBJECTS, you need a user name and password to launch an application, and to connect to the database where your business data is stored.

BUSINESSOBJECTS enables you to work with a single set of user names and passwords thanks to the BOUSER and BOPASS variables. BOUSER and BOPASS store the user name and password you enter when you launch a BUSINESSOBJECTS application, and pass these to the database connection you need to interact with your database. The universe designer can specify that the connection to the database is managed by these variables, so that when you launch BUSINESSOBJECTS, the user name and password you enter are reused for the database connection.

Simplified security and guaranteed processing

BOUSER/BOPASS security clearly simplifies the work of the person who sets up BUSINESSOBJECTS at your site. In addition, the BUSINESSOBJECTS supervisor can switch on a *No Password Checking* feature so that the password you enter when you launch any BUSINESSOBJECTS application is systematically ignored.

What happens if the BUSINESSOBJECTS supervisor switches on *No Password Checking*, and uses BOUSER/BOPASS? How can BROADCAST AGENT process a document without the password required to access the corporate database?

BROADCAST AGENT can process documents in configurations where *No Password Checking* and BOUSER/BOPASS are used, thanks to the repository. When you send a document to BROADCAST AGENT, the password you used to launch BUSINESSOBJECTS is passed to the repository's security domain. The password is stored (and encrypted) in the JOB_DATA column of the DS_PENDING_JOB table of the security domain.

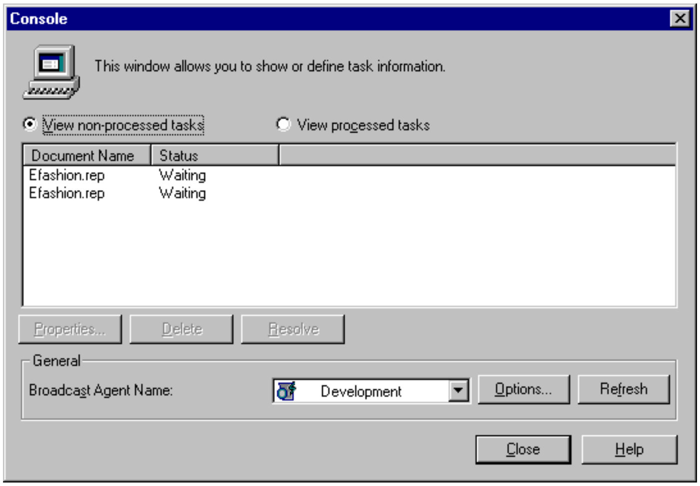
So even though BUSINESSOBJECTS ignored your password when you launched the application (because the supervisor used the *No Password Checking* feature), your password is recorded in the repository, and can be reused by BROADCAST AGENT. The database connection required to refresh your document now works, because it "knows" the password.

What if the database connection password changes?

Between the time you send the document to BROADCAST AGENT and the time BROADCAST AGENT will start processing the document, the database connection password can be changed, for example by your Database Administrator (DBA). In this case, BROADCAST AGENT fails to process the document because the database connection password is wrong.

No problem: with BROADCAST AGENT you can reset your password so that the database connection can work. Here's how to do it:

1. Get the new database connection password from your DBA.
2. Relaunch BUSINESSOBJECTS and enter the new password in the Password field of the User Identification dialog box.
3. Select the Console command on the Tools menu.
   The Console appears.
4. Make sure that *View non-processed tasks* is selected, as shown here:



5. Click the failed task in the document list.
   - Note that the task's status is Waiting, not Failed.
   - If you are not sure which document to select, select all Waiting documents.
6. Click Resolve.
   BUSINESSOBJECTS resets your password in the JOB_DATA column on the security domain of the repository. This password is then used in the database connection required to refresh the document.

Note: The Resolve button is only available in the Console that you use in BUSINESSOBJECTS. It is not available when you run the Console on the BROADCAST AGENT machine.

Avoiding Problems Before You Begin

You should be aware of the following known limitations before sending your documents to BROADCAST AGENT.

Can you use BOUSER/BOPASS security with report bursting?

Report bursting is the BROADCAST AGENT feature that distributes a copy of a processed document based on user profiles. You activate report bursting by selecting *Refresh with the Profile of Each Recipient* in the Actions tab of the Send to Broadcast Agent dialog box. For more information about this feature, refer to the example entitled "Report bursting" on page 265.

If your supervisor has switched on the *No Password Checking* feature in SUPERVISOR, and has set up BOUSER/BOPASS security, report bursting does not work. Here's why not.

When BROADCAST AGENT "report bursts" a document, it processes one copy of the document for each user, according to the user's profile set by the supervisor. So, for each user, BROADCAST AGENT:

- Opens one copy of the document in BUSINESSOBJECTS on the server.
- Refreshes each copy of the document using the security information for each user.

With BOUSER/BOPASS security, the user name and password the user entered when launching BUSINESSOBJECTS is used to gain access to the corporate database. But the user who launched BUSINESSOBJECTS and scheduled a document using report bursting does not have the user name/password combination as that of each recipient of the document. BROADCAST AGENT launches BUSINESSOBJECTS on the server with the profile of each recipient, so fails to connect to the corporate database, precisely because the user name and password for the recipient are different from those entered by the person who scheduled the document in the first place.

The way round this problem is to avoid using BOUSER/BOPASS security if you intend to use report bursting.

Does the document contain OLAP data providers?

In BUSINESSOBJECTS, you can retrieve data from OLAP servers such as Hyperion Essbase and Oracle Express, provided that you have installed the BUSINESSOBJECTS Access Pack for these products. This section covers what you can and can't do when you schedule documents containing OLAP data providers.

Scheduling documents containing Microsoft OLAP Services data providers

You can schedule documents containing data providers built on a Microsoft OLAP Services database, but in limited circumstances only.

Microsoft OLAP Services authenticates users with Windows NT security information. In other words, it's your Windows NT login, not your BUSINESSOBJECTS login, that gives you access to the data in your Microsoft OLAP Services database. When you manually refresh a BUSINESSOBJECTS document containing a Microsoft OLAP Services data provider, the database retrieves your NT user name and password from your NT system; if these are the same as the user name and password defined for you by your NT administrator on the Microsoft OLAP Services side, you gain access to your data, and successfully refresh your document.

So how do you refresh your document using BROADCAST AGENT? The BROADCAST AGENT workflow to process a document containing Microsoft OLAP Services data providers is as follows:

- Ahead of time, your BROADCAST AGENT administrator defines an NT user name and password to start BUSINESSOBJECTS on the server.
- At the scheduled time, BROADCAST AGENT launches BUSINESSOBJECTS on the server, using the user name and password defined by the BROADCAST AGENT administrator.
- To allow BUSINESSOBJECTS to retrieve data from the database, Microsoft OLAP Services checks the NT user name and password defined on the server machine where BUSINESSOBJECTS is active.
- If the NT user name and password on the server machine running BUSINESSOBJECTS are the same as those defined on the Microsoft OLAP Services side, BUSINESSOBJECTS gains access to the data, and refreshes the

document. If the user names and passwords are different, BUSINESSOBJECTS cannot refresh the document, and BROADCAST AGENT returns a failed task.

In summary: the administrator can enable you to schedule documents containing Microsoft OLAP Services data providers by defining a database account with the user name and password also defined for BROADCAST AGENT. Be aware that BROADCAST AGENT will refresh the scheduled document with the rights of the NT administrator.

Report bursting documents with OLAP data providers

Report bursting is the BROADCAST AGENT feature that distributes a copy of a processed document based on user profiles. You activate report bursting by selecting *Refresh with the Profile of Each Recipient* in the Actions tab of the Send to Broadcast Agent dialog box. For more information about this feature, refer to the example entitled "Report bursting" on page 265.

You can report burst documents containing OLAP data providers built on Essbase or IBM DB2 for OLAP servers. You cannot, however, report burst documents built on the other OLAP data providers available with BUSINESSOBJECTS, namely, Express, MetaCube, SAP Business Intelligence Warehouse (BW), and Microsoft OLAP Services. Here's why not.

When you build an OLAP data provider in BUSINESSOBJECTS, you have to enter the user name and password that lets you access the OLAP database itself. When you schedule a document containing an OLAP data provider, BUSINESSOBJECTS prompts you to enter that same user name and password, stores that information in the document, and lets BROADCAST AGENT reuse it when BROADCAST AGENT processes the document.

The advantage of report bursting is that BROADCAST AGENT refreshes the document based on the profile of each recipient. Each user's profile is determined by a user name and password, which in the case of documents with OLAP data providers, is entered by users when they schedule documents. (To see how this works, refer to "What to do if the OLAP User Identification dialog box appears" on page 249). Therefore, BROADCAST AGENT processes the document once for each recipient, but in each case with the same profile, in other words, the same user name and password that the user entered when scheduling the document.

Why report bursting does work with Essbase and IBM DB2 for OLAP data providers

The reason that report bursting does work with Essbase and IBM DB2 for OLAP is as follows: users can connect to these OLAP servers by typing @variable("BOUSER") and @variable("BOPASS") instead of entering their full user name and password. These are the variables described under "Resolving Database Connection Failure" on page 286. Using these variables means that

BROADCAST AGENT can retrieve the user name and password for each recipient when processing the document, and can use that information to generate a version of the document per recipient.

> The restriction on *No Password Checking*, described under "Can you use BOUSER/BOPASS security with report bursting?" on page 289, also applies here. You can only use report bursting as described above if the supervisor has switched on *Full Password Checking*.

What to do if the password to the OLAP server changes

Imagine the following scenario:

- You have scheduled a document containing an Oracle Express data provider, and have chosen *Refresh With The Profile of Each Recipient*, i.e., report bursting.
- BROADCAST AGENT successfully "bursts" your document, thanks to the implementation of BOUSER/BOPASS security, as described above.
- Your server administrator changes the password to the Express server. Therefore, your password is no longer the same as the one required to access your data. BROADCAST AGENT cannot process your document without that information.

In this case, you have to make your password the same as the one of the OLAP server. Your BUSINESSOBJECTS supervisor can do this for you, or you can do it yourself in BUSINESSOBJECTS (Change Password command, Tools menu). If you do it yourself in BUSINESSOBJECTS, make sure you are connected to the repository, i.e., not working in offline mode.

Does the document return a Cartesian product?

If you schedule a document that contains a Cartesian product, document processing may fail if the universe designer has prevented you from executing queries that return Cartesian products.

Note that the designer may have granted you the right to create a document with a Cartesian product, then later removed this right.

What you can do

Either change the condition in the document to avoid a Cartesian product or ask the designer to change the universe parameters to allow Cartesian products.

For more information about Cartesian products, see the *Designer's Guide*.

Does the document use the @variable function?

If you start BUSINESSOBJECTS with a command line such as

```
busobj.exe -vars myvar.txt
```

and send a document containing variables, for example

```
@variable('MYVAR')
```

this document is refreshed locally on the client machine. Therefore, if you send a document to a BROADCAST AGENT located on another machine, and the variables are not defined on the server machine, all the tasks (documents) needing the variable definition will fail.

What you can do

Share the file containing the variable definitions or copy it onto the server machine.

The file specified contains the variable definitions, and will be used by all the tasks that need them.

Does the document contain user objects?

BUSINESSOBJECTS REPORTER users can create their own objects, called user objects, when the objects in their universes do not give them the data they need. (Working with user objects is described in the *BusinessObjects User's Guide*.)

BROADCAST AGENT can process documents containing user objects, but the user objects will be ignored. This means that you will not obtain the data from these objects; the corresponding data simply won't be in your document. BROADCAST AGENT returns an error message to the Console (*Some obsolete objects have been removed*).

Note: This error is not specific to user objects. It also appears when, between the time you sent your document and the time BROADCAST AGENT processes it, the universe designer has removed objects that you use in your document, and exported the universe to the repository.

What you can do

The best solution to this problem is to avoid sending documents containing user objects to BROADCAST AGENT. User objects are designed for individual use; if you need them for general use across your company or organization, you should have the universe designer turn the user objects into regular universe objects.

Using BUSINESSOBJECTS REPORTER, you then must:

1. Import the updated universe from the repository.
2. Remove the user object from the query.
3. Add the new object created by your universe designer.
4. Run the query.
5. Send the document to BROADCAST AGENT again.

For information on importing universes and editing queries, see the *BusinessObjects User's Guide.*

Understanding and Fixing Errors

BROADCAST AGENT can fail to process your documents for many different reasons. To help you to fix each type of processing error, BROADCAST AGENT returns a error message which you can display in the Broadcast Agent Console.

Viewing errors in the Broadcast Agent Console

To view errors in the Console:

1. Select the Console command on the Tools menu in BUSINESSOBJECTS.
2. Click the Options button.
   The Broadcast Agent Options dialog box appears.
3. In the Available Columns box, double-click Error, then click OK.
   The Broadcast Agent Options dialog box closes, and the Error column is now visible in the Console.

All the errors that BROADCAST AGENT returns are described in the *Error Message Guide*. You can consult the guide on-screen by selecting the Error Messages Explained command on the Help menu.

Using macros to define custom error messages

You can create your own BROADCAST AGENT error messages using a custom VBA macro. BUSINESSOBJECTS user defined error message numbers start at 3000. You can create a description that indicates the reason for failure. Note that once an error is raised, the macro will exit.

Here is some sample code to get you started.

Example **Custom error message for Broadcast Agent**

```
Sub GenCustomError()
        On Error GoTo ErrorHandler ' Enable error-handling
routine....
Exit Sub

        ErrorHandler:       ' Error-handling routine.
        Err.Raise 3100, , "Error Text Here."
End Sub

Sub RefreshCustomError()
        On Error GoTo ErrorHandler 'Enable error-handling routine
        Dim Doc as Document
        Set Doc = Application.Documents.Item(1)
        Doc.Refresh
        Exit Sub

ErrorHandler:  'Error-handling routine
        Err.Raise 3200,,"Error Text Here."
        endif
End Sub
```

Enhancements Over Document Agent Server

This section describes the enhancements that Broadcast Agent delivers to fix problems that required troubleshooting with Document Agent Server.

Improved error management

Document Agent Server handled two types of error messages:

- Four-digit codes such as 3002.
- Long text messages which were only available on the secondary Document Agent Server machine.

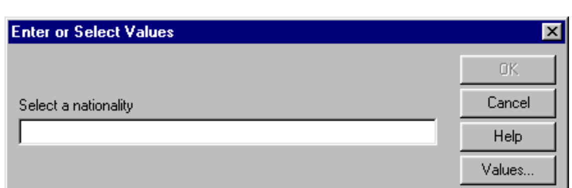
Broadcast Agent returns long text messages which you can display in the Broadcast Agent Console, in BusinessObjects (Console command, Tools menu), in your Web browser using InfoView, and on the Broadcast Agent machine.

For information on displaying information in the Console, see “Changing the Console’s display settings” on page 276.

Documents with query prompts

Query prompts incite you to select values when you create or refresh a document in BusinessObjects. The values you select filter the data that BusinessObjects subsequently returns to the document. Prompts can be defined in the query itself, or in the universe, by the universe designer.

When you send a document to Broadcast Agent, if you have requested to refresh the document, and if the document contains prompts, BusinessObjects displays the Enter or Select Values dialog box.



You enter the values that will filter the document, then click OK. Broadcast Agent will use these values when processing your document.

DOCUMENT AGENT SERVER 4.1 also supported documents with prompts. However, DOCUMENT AGENT SERVER failed to process documents containing prompts if the universe on which the document was built was modified in any way between submission and processing time.

BROADCAST AGENT can process documents with prompts even if the universe changes between submission and processing time.

Documents with contexts

A context lets users select one of two paths between database tables when running a query on a universe.

In 4.1, tasks sent to DOCUMENT AGENT SERVER failed if:

- The document contained a query that prompted the user to select a context, and
- The universe designer had exported a modified version of the universe to the repository since the last time the document was refreshed.

BROADCAST AGENT now successfully processes documents which require contexts, even if the universe designer has modified the universe.

For more information about contexts, see the *Designer's Guide*.

No Password Checking with BOUSER/BOPASS

DOCUMENT AGENT SERVER was unable to process documents where:

- The supervisor set up your BUSINESSOBJECTS user name and password and activated the *No Password Checking* option, and
- The universe designer set up the connection to the corporate database with the BOUSER and BOPASS variables.

Thanks to changes made to the repository, this is no longer the case with BROADCAST AGENT. see "Resolving Database Connection Failure" on page 286 for more information.

Chapter 12 Web Publishing BusinessObjects Documents

In this chapter

What Is Web Publishing?

"Web publishing" is the communication of information by making documents available on the World Wide Web. This involves:

- Converting documents into Hypertext Markup Language (HTML), the format that is recognized by Web browsers.
- Placing documents on a Web server, so that people browsing the Web or working on an intranet can access them.

Note: In this chapter, the term "documents" refers to BUSINESSOBJECTS .rep files. A document can contain one or many reports. Each report has its own tab inside the document.

The Web is quite simply the best way to tell the world about your business. It allows online users to view and download up-to-the-minute information.

You can publish documents both externally, on the Internet, or internally, on your corporate intranet. The following examples show how useful each can be:

Example **Publishing on the Internet**

On your corporate Web site, you want to illustrate the company's exponential growth over the last financial year. You create a BUSINESSOBJECTS document which displays the growth curve in a column chart.

You save the document in HTML format, then post it in your Web site.

Example **Publishing on an intranet**

You use BUSINESSOBJECTS internally to report on weekly sales performance. By publishing your documents on your intranet, the sales force can get the information they need using their Web browser.

Publishing to Microsoft Channels

BUSINESSOBJECTS lets you publish documents to *channels*, Web sites designed to deliver content from the Internet to your computer. You subscribe to a channel using Microsoft Internet Explorer, and can choose to have the information on the channel brought to you every time it changes.

People who use your Web site or Intranet can thus subscribe to documents: every time you refresh the documents, you automatically deliver the information to your subscribers.

For more information, see “Publishing Documents to Channels” on page 317.

How is this different than sharing documents with InfoView users?

When you *Web publish* a BusinessObjects document, you use BUSINESSOBJECTS to create your documents, you publish them in HTML format, then you post those HTML versions on a corporate intranet, extranet, or the World Wide Web.

On the other hand, BUSINESSOBJECTS users can share documents seamlessly with INFOVIEW users via the repository. The first time an INFOVIEW user asks to view a BUSINESSOBJECTS document in HTML format, the server converts the document into HTML format *at that time*, then displays it in the user’s Web browser.

A copy of that file remains in the browser’s cache until the end of the INFOVIEW session. That way, the document can be displayed more quickly should the user want to view the document again.

For more information, see Tip: "The Open on Retrieval option in the Retrieve dialog box automatically opens all documents that you retrieve. If you activate Open on Retrieval then double-click a document name in the Retrieve dialog box, the document appears immediately in BUSINESSOBJECTS." on page 207. For more information on INFOVIEW, see the INFOVIEW documentation in the first part of this manual.

The Web publishing process

This section describes the steps involved in the BUSINESSOBJECTS Web publishing process. It also contains an illustration of a published document, which highlights features such as navigation, graphics conversion and frame support.

Step 1: Generating an HTML document

The first step in Web publishing is to generate an HTML version of your document. Afterward, you can do either of the following:

- Save the document by using the Save As command on the File menu.
- Send the document to BROADCAST AGENT.

  BROADCAST AGENT handles scheduled processing. It is described in full in Chapter 10 "Scheduling BusinessObjects Documents" on page 227.

Tip: You can add your own HTML to documents. For example, you can include a jump to a Web page. For more information, see “Writing HTML in Documents” on page 307.

Step 2: Placing the HTML document on a Web server

The second step in Web publishing is to place the document on a Web server. The following table shows how the way you do this depends on the way you completed the previous step:

If you...	Then You...
Used the Save As command	Must place the document on the server by moving it through the file system.
Sent the document to BROADCAST AGENT	Can have BROADCAST AGENT automatically place the document on a server you specify.

Note: You cannot protect a BUSINESSOBJECTS document with a password if you are publishing it on the web.

Frequently asked questions

The following table provides answers to some frequently asked questions about Web publishing with BUSINESSOBJECTS.

Questions	Answers
Documents with many reports If my document contains several reports, can I specify the ones I want in the .htm document?	You can include all, some or only one report in the .htm document. Each report you include has a corresponding tab in the browser.
Downloading documents Can I let other users download the document to BUSINESSOBJECTS?	Yes, but you can also choose not to let other users download the document.
Graphics resolution How do graphics come out?	BUSINESSOBJECTS converts all charts and pictures to .gif format.
Frames Are frames supported?	Yes.
Formats What about formatting (fonts, borders, background colors, etc.)?	Formats appear in the .htm document as they do in BUSINESSOBJECTS. Font sizes, however, are approximate.
Report layout Does report layout stay the same?	Yes.
Automatic reload Can I automatically load the published .htm file at regular intervals?	Yes. You can specify the interval at which you want the document to be reloaded. Any changes in the document in BUSINESSOBJECTS will be mapped to the published file.
Navigation Is there a way of including jumps to report sections?	Yes. With BUSINESSOBJECTS, you can publish a report in one HTML page, or on a one-page-per section basis.

HTML objects

Web publishing involves not only BusinessObjects but also Designer. This section briefly describes how the universe designer can create HTML objects in BusinessObjects universes.

An HTML object maps to columns in a relational database, just like any other object. Its added feature is an HTML "wrapper" that enables users to drill down in published documents. Here is an example:

Example **Definition of an HTML object**

The universe designer creates an object named City. When included in a query, City returns a list of city names. When the user publishes the document containing data returned by City, anyone viewing the published document can click on a city name and drill to a map showing the city's exact location.

The object definition contains the SQL required to retrieve the data from the database, plus HTML that provides a dynamic link to the image files:

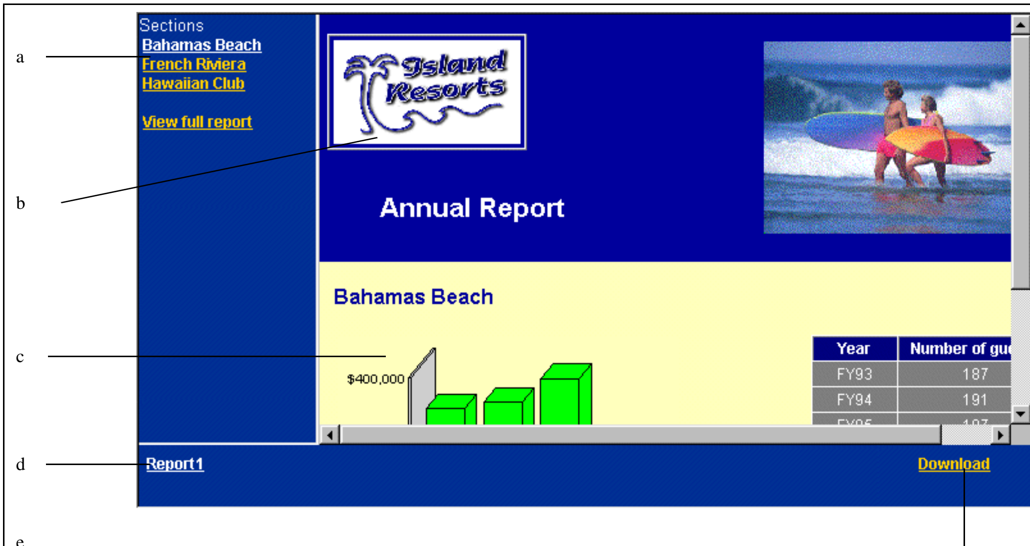
```
‘<a href=”web/&City.city_name’.gif”>’City.city_name’</a>’
```

Data retrieved by HTML objects is underlined in published documents, which indicates that you can click a value to drill down.

A published document

The following illustration shows a published document and points out:

- How you can navigate between reports, report sections, and view all sections as one page.
- How to download the document.



a. BusinessObjects can publish reports section by section. The user viewing the report clicks a section name in the frame, and the section appears in the browser. The user can also click ***View full report*** to display the report in one page.

b. Pictures are converted to .gif files.

c. The layout of blocks, cells and pictures is respected in the published document.

d. In a BusinessObjects document, each report is identified by a tab. This is also the case in published documents. The user clicks a tab to switch to a different report.

e. The ***Download*** option allows users to download the document, then continue to work on it with BusinessObjects on their desktop.

Figure: A document published on the Web

Writing HTML in Documents

This section explains how you can add your own HTML to documents. It concerns you if you understand HTML and want to use your knowledge to customize your documents before publishing them on the Web. If you just want to find out about saving documents in HTML format, see "Saving Documents in HTML Format" on page 309.

You can easily add hyperlinks such as email addresses and web site addresses to your reports. BUSINESSOBJECTS automatically recognizes certain keywords or symbols included in the address, adds any extra syntax behind the scenes and formats the address as a hyperlink. Hyperlinks you add to a BUSINESSOBJECTS report are retained when you save the report in PDF or in HTML format.

BUSINESSOBJECTS automatically recognizes the keywords, syntax and symbols in the table below and turns them into hyperlinks:

Keyword or syntax	Automatically recognized and formatted as....
HTTP *or* www	HyperText Transfer Protocol
MAILTO *or* @	Electronic Mail
FILE	Host-specific Files
<a href	specified in the HTML code
FTP	File Transfer Protocol
NEWS	Usenet news
TELNET	Telnet Protocol for Interactive Sessions
GOPHER	Gopher and Gopher+ Protocols
WAIS	Wide Area Information Servers Protocol
PROSPERO	Prospero Directory Service
NNTP	Usenet news using NNTP access

How are hyperlinks formatted?

If you have Microsoft Internet Explorer installed, hyperlinks in BUSINESSOBJECTS reports are formatted according to the settings you have made in Internet Explorer. If Internet Explorer is not installed on your computer, unused hyperlinks are formatted in blue and underlined.

Note: You can only write HTML in documents if you are working with the BUSINESSOBJECTS REPORTER or EXPLORER module.

Before saving a document in HTML format, you can customize it by adding your own HTML coding. When you publish the document on the Web, the HTML you added is embedded inside it. Here is an example:

Example **Providing a link to another Web site from a published document**

Your company works in partnership with other companies. Your corporate Web site contains BUSINESSOBJECTS documents that show the combined performance of your organization and that of your partners. In each document, you provide a link to the partner's Web site by inserting the required HTML in a document cell, i.e.,

`<A HREF="http://www.partnersite.com">`Click here to go to our partner's Web site!`</A>`

To write HTML in a document:

1. Click inside a part of the document where you want to insert HTML.
2. Insert a new, free-standing cell.
3. Click inside the cell, write your HTML and press the Enter key or click out of the cell.
   BUSINESSOBJECTS automatically detects the hyperlink and formats accordingly.

Note: Selecting and resizing cells containing hyperlinks can be a little tricky because every time you click on the cell, the hyperlink is activated. Make the cell containing the hyperlink longer than the actual text inside it so that you can select the cell after the address without activating the hyperlink.

Saving Documents in HTML Format

When you save a document in HTML format, you can allow other users to download the document. The advantages of this feature are twofold:

- Quick and easy distribution, especially on an Intranet. You publish a document once, and all your users can download it.
- BUSINESSOBJECTS downloads all the data in the document, which means that users can continue to work on the document on their own computer. For example, they can perform analysis to view the results they want.
  Users can also refresh the data, provided they have the right to use the connections required.

BUSINESSOBJECTS also provides formatting options to ensure that the formats you have applied to your document appear in the HTML version. Finally, navigation options make it easy for users to find the information they want when viewing published documents on the Web.

This section provides information on character support, and describes how to:

- Save a document in HTML format
- Allow other users to download the published document
- Select formatting options
- Set up navigation to provide links to report sections.

What happens to special characters in HTML?

If you're planning to distribute information over the World Wide Web or your corporate Intranet by saving BUSINESSOBJECTS documents in HTML format, you should be aware of the following limitations in characters that you use in your document data, document names and report tab names.

Characters supported in document data

Your documents may contain data that may appear in Euros, or other "special" characters. These special characters are supported in HTML if the browser used also supports them. If the browser does not support special characters, they are displayed as Unicode symbols.

Characters supported in document names and report tab names

The characters that you can use in the names of documents that you save as HTML files depend on your operating system. If the operating system supports a character, then you can use it in the name of your HTML document.

Characters not supported by your operating system will be replaced by an underscore (_). For example, if the space character is not supported, *My Document.rep* becomes *My_Document.htm*.

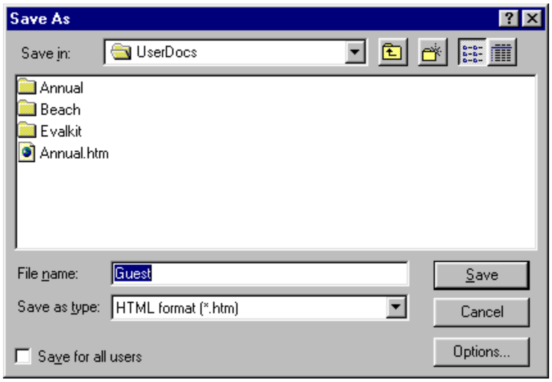
Any characters other than A-Z and 0-9 (ABCDEFGHIJKLMNOPQRSTUVWXYZabcdefghijklmnopqrstuvwxyz0123456789) that you use in report tab names will be replaced by an underscore in the HTML document. So, if your document contains a tab which you renamed to *Sales%*, this will appear as *Sales_* in the HTML document, where the underscore (_) replaces the % sign.

Note: Your company or organization may be planning a BUSINESSOBJECTS deployment on different operating systems. What one operating system supports, another may not. For information on operating system support, refer to the *Deployment Guide*.

Saving a document in HTML format

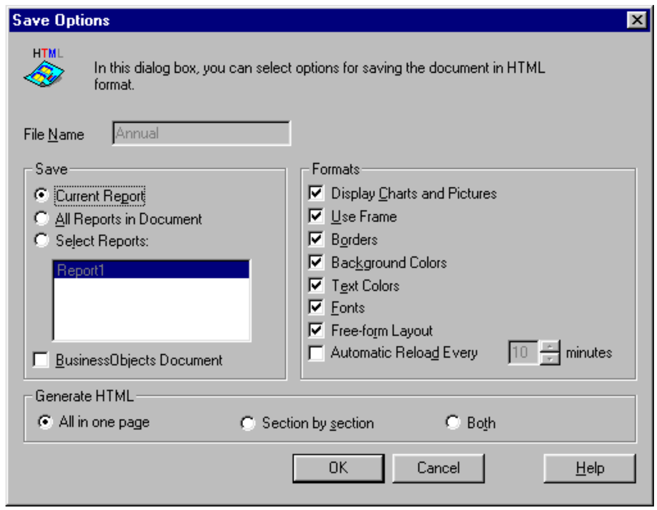
To save a document in HTML format:

1. Make sure the document is open in BUSINESSOBJECTS.
2. Select the Save As HTML command on the File menu.
The Save As dialog box appears. The *HTML format (*.htm)* option is already selected in the *Save as type* box.



3. Move to the folder in which you want to save the document, type its name in the *File name* box.

4. Click Save.
The HTML Options dialog box appears.



5. In the Save group box, select an option to specify which reports from the document you want to save in HTML format:
   - *Current Report* saves only the report that is displayed on your screen.
   - *All Reports in Document* saves all the reports in the document.
   - *Select Reports* lets you select just the reports you want.

6. Check *BusinessObjects Document* to allow other users to download the document.

7. Select formatting options in the Format box.

8. Select an option in the Generate HTML group box.
These options affect the way users can navigate through the document in their Web browser, and are described in the following table:

This option...	Publishes each report...	And enables users to...
All in One Page	As one HTML page.	Print or search whole reports.
Section Per Section	With a browser which contains a link to each report section. Each section generates one HTML file.	Jump from section to section, especially useful in large reports.
Both	Displays the browser as with the *Section Per Section* option, but also lets users view the report in one page.	Switch between the one-page view and the per-section view.

9. To save the HTML document with the options you selected, click OK.
   - BUSINESSOBJECTS makes a copy of the document and saves it in HTML format.
   - The original document remains on your screen.

For information on viewing, navigating and downloading Web-published documents, see “A published document” on page 306.

Files and folders created with HTML documents

When you save a document in HTML format, BUSINESSOBJECTS creates a number of files and folders. These files and folders manage graphics, navigation, downloading, frames and multiple reports in the same document. They are all located in the UserDocs folder, and are described in the following table.

Note: The table lists all the files that can be created. This is the case when you select the *Both* option in the Save Options dialog box. For information on this and the other options available, see "Saving a document in HTML format" on page 310.

Folders	Files	
Name	**Name**	**Purpose**
Same as the document you saved.	`Doclinks.htm`	A navigation frame on the left of the published document.
	`Download.htm`	A link to download the document.
	`*.rep`	The BUSINESSOBJECTS document to download.
Same as the report(s) in the document.	`*.gif`	One image per chart and picture in the report.
	n`.htm`	One link per section.
	`reportname.htm`	A link for users to view the report as one page.
	`seclinks.htm`	A link to view one page per section.

Web Publishing with Broadcast Agent

BROADCAST AGENT provides scheduled (or batch) processing of documents. BROADCAST AGENT can refresh, print and distribute documents at specified times or intervals. It can also save documents in HTML format and publish them on a Web server.

This section describes how you, the end user, can have BROADCAST AGENT publish your documents on a Web server. More information on BROADCAST AGENT is also available:

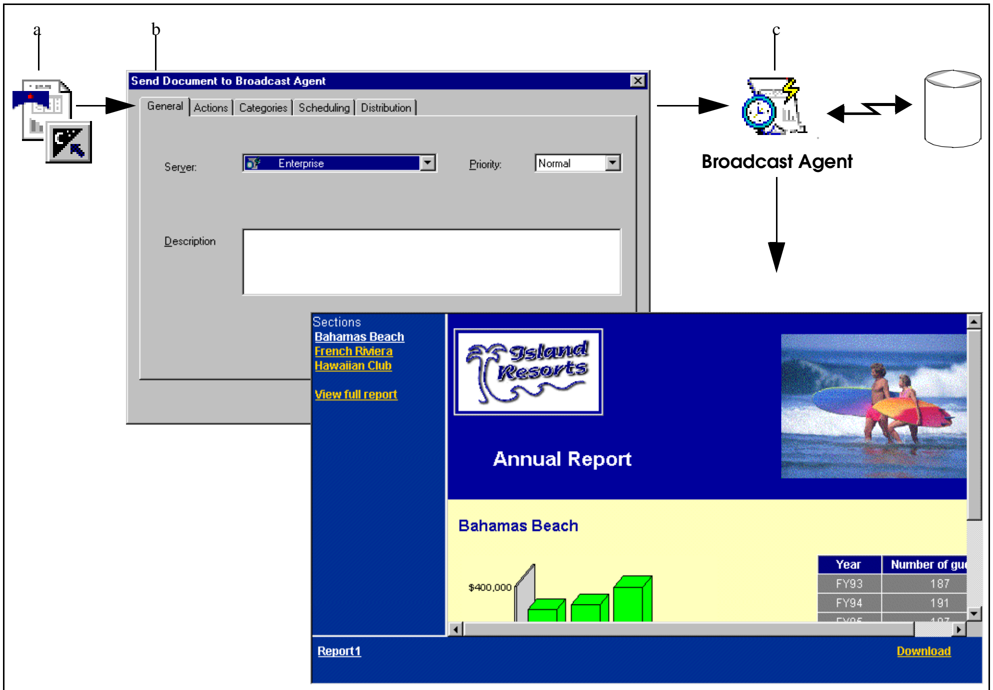
Information on...	Is available in...
How the BROADCAST AGENT administrator sets up and manages the server	The *BusinessObjects Deployment Guide* and the *Broadcast Agent Administrator's Guide*
How BROADCAST AGENT works	"What can Broadcast Agent do?" on page 229.
Having BROADCAST AGENT perform other tasks (printing, refreshing etc.)	"Scheduling a Document" on page 235.

Advantages of Web publishing with Broadcast Agent

BROADCAST AGENT provides powerful and reliable Web publishing. It can:

- Save documents in HTML format.
- Publish these on a Web server that you specify.
- Refresh the documents at set intervals, so that the data published on the Web is always up-to-date.

The following illustration shows the advantages of Web publishing with BROADCAST AGENT.



a. You send a document to BROADCAST AGENT by clicking the Send To Broadcast Agent button on the Document Exchange toolbar in BUSINESSOBJECTS.

b. You specify the Web server on which BROADCAST AGENT will publish the document, and specify refresh intervals (e.g., every day at midnight). You also set HTML options to control the display of the published document (e.g., in frames, with or without download, etc.).

c. BROADCAST AGENT converts the document to HTML format, publishes it on the Web server, and refreshes it at the intervals you specified. At each refresh, BROADCAST AGENT brings up-to-the-minute data from the database to the published document.

To Web publish a document with Broadcast Agent

You can only publish a document with BROADCAST AGENT if the following conditions are met:

- Your supervisor has granted you access to BROADCAST AGENT.
- You are working online.
- The document is open in BUSINESSOBJECTS.

  You can submit only one document at a time, so if several documents are open, only the active document is sent.

Here are the steps:

Send to Broadcast Agent

1. Click the Send to Broadcast Agent button on the Document Exchange toolbar.
   The Send Document to Broadcast Agent dialog box appears.
2. In the General tab, select the server and the document's priority, and write a description of the document if you like.
3. In the Distribution tab, check *Distribute via Web Server*.
   The field below the checkbox indicates the path to the folder that will receive the published document. Specify a folder by clicking *Browse*, or by typing a path, e.g., `\\HostName\FolderName`.
4. Set options for the HTML version of the document by clicking the HTML Options button.
   The options in the dialog box that appears are described on page 311.
5. In the Actions tab, specify the actions you want BROADCAST AGENT to perform.
6. Click the Scheduling tab and specify the time or intervals at which you want BROADCAST AGENT to process the document.
7. Click OK.

Tip: For more information on publishing and distributing documents with BROADCAST AGENT, see Chapter 10 "Scheduling BusinessObjects Documents" on page 227.

Publishing Documents to Channels

A channel is a Web site designed to deliver content from the Internet to your computer. You subscribe to a channel using Microsoft Internet Explorer version 4.01 or higher, and can choose to have the information on the channel brought to you every time it changes.

BUSINESSOBJECTS lets you can publish documents to channels. People who use your Web site or Intranet can thus subscribe to BUSINESSOBJECTS documents: every time you refresh the documents, you automatically deliver the information to your subscribers.

Who sets up and manages channels in BusinessObjects?

Your BUSINESSOBJECTS supervisor is responsible for setting up and managing the channels. You can only publish to channels if you have access to BROADCAST AGENT. The BUSINESSOBJECTS supervisor sets up channels for each user group with BROADCAST AGENT access.

Privileged users can also set up and manage channels in BUSINESSOBJECTS. For more information, see "Setting up and managing channels in BusinessObjects" on page 319.

How do you subscribe to a channel in Internet Explorer?

First, you have to be using Microsoft Internet Explorer (IE) 4.01 or higher. Browsers from other vendors, and previous versions of IE do not support channels.

To subscribe to a channel in IE:

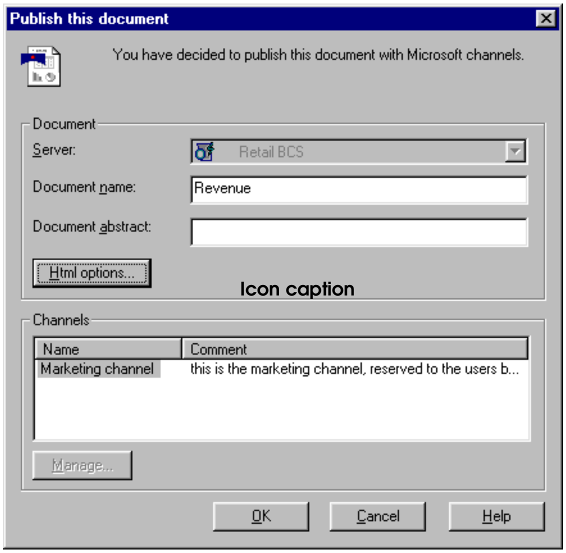
1. On the toolbar, click the Channels button.
2. In the Explorer bar, click Channel Guide, and then follow the instructions on your screen.

For more information on channels and IE, refer to the IE online help.

To publish a document to a channel in BusinessObjects

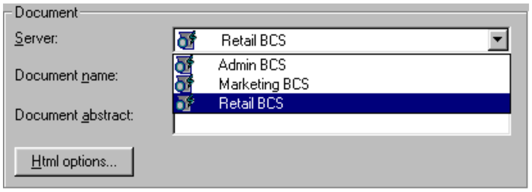

Publish to Channels

1. Open the document, then click the Publish To Channels button on the Document Exchange toolbar.
   The Publish dialog box appears.



   The dialog box shows:
   - The name of the server for the user group you belong to.
   - The name of the document.
   - The channels you can choose from.

2. To select a different server, click the Server list box.
   The following illustration shows that the user has three servers to choose from:



   The supervisor sets up one server per user group, so you only have a choice of servers if you belong to more than one user group.

3. In the Document abstract field, enter the tooltip for the channel.
   This information will appear over the channel icon in the user's Web browser.

4. Click HTML Options to set the HTML formats for the document you are publishing.
   For information on the options in the dialog box appears, click the Help button in the dialog box, or see “Saving a document in HTML format” on page 310.

5. In the Channels list, click the channel you want, then click OK.

What happens next?

- The HTML version of the document is posted on the Web channel you selected.
- Microsoft Internet Explorer delivers the information to the channel subscribers.

Setting up and managing channels in BusinessObjects

The supervisor sets up and manages channels, but privileged users can also do this in BUSINESSOBJECTS.

To create, modify or delete a channel:

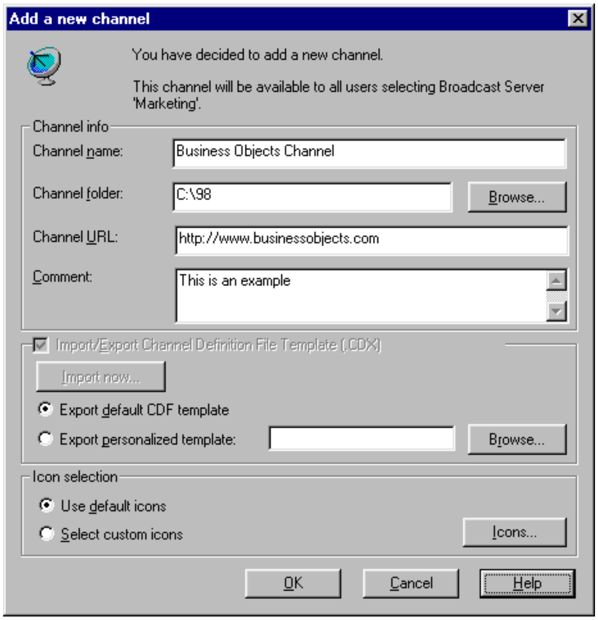
1. Open a document, then select the Publish To>Channels command on the File menu.

2. In the dialog box that appears, click Manage.
   The Channels Available dialog box appears.

3. The next step depends on what you want to do:

To...	Click...	Then...
Add a channel	Add	Go to the next step.
Modify a channel, e.g., point to a different URL	The channel name	• Click Modify. • Go to the next step.
Remove a channel	The channel name	• Click Remove. • Click Yes in the message box that appears. • Click Close.

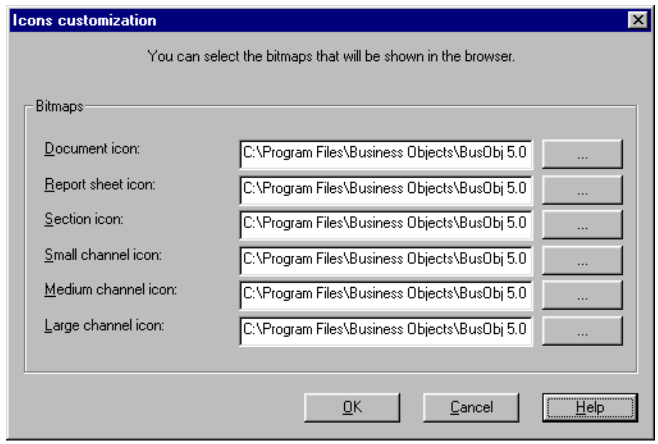
4. If you clicked Add or Modify, the Add a new channel or Modify a channel dialog box appears.



5. Specify channel info options.

6. Select a template.

7. Specify the icons you want to use in the channel.
   BUSINESSOBJECTS provides icons for you, and if you want to use these, select *Use default icons*. To select custom bitmaps, click *Select custom icons*, then the Icons button.
   The Icons customization dialog box appears.



8. To specify a different icon, type the path to a .gif file or click ... to find the file using a browser.

Tip: Click OK to close the Icons customization dialog box, then close the other dialog boxes to return to your document.

Chapter 13 Printing Documents

In this chapter

Overview

A BUSINESSOBJECTS document can contain several individual reports within the document. You can set the page orientation, paper size, and margins best adapted to the contents of each report. For example, a report with a summary table and chart may need a landscape page, while another report might have a long detail table that works best on a portrait page. Before printing, you can check your page layout in print preview.

You can choose to print the whole document, one report, or selected reports at one time. You can print all the reports in one document on one printer, or you can select different printers for different reports. For example, you might want to send a report containing detailed figures to a printer located in your finance office and send an overview of annual sales results to a printer in your marketing office.

Note: For more information about printing WEBINTELLIGENCE documents, please see Part I of the INFOVIEW User's Guide.

Preparing Reports for Printing

When you're ready to print, go to the Page Setup dialog box. You can set and check all printing options from this dialog box and then verify your settings in the print preview window.

The settings you make for a report in the Page Setup dialog box will apply to the report(s) you have selected. A report is selected if the title on the report tab appears in **bold**. The settings you specify are saved with the report.

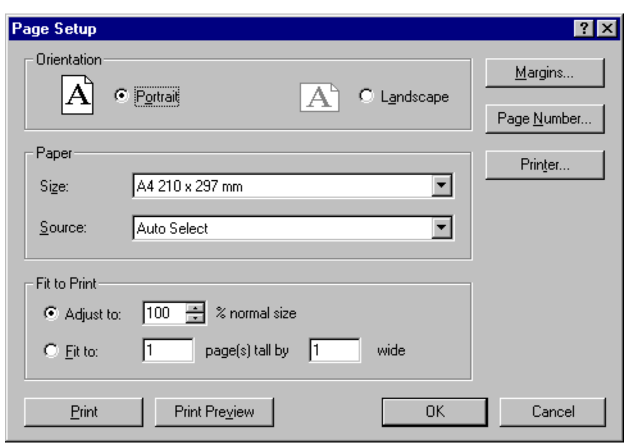
Setting up pages for printing

You can define and apply different page formatting to one report or to several reports in your document.

1. To set up pages for one report, make sure the report tab of the report you want to format appears in **bold**. To set up pages for multiple reports, select the report tab of one of the reports you want to print and then hold down the Ctrl key to select the other reports.

2. From the File menu, choose Page Setup.

The Page Setup dialog box opens.



Setting page orientation

Choose the orientation for the printed page. The orientation you choose depends on how your report has been set up. By changing the page orientation you can sometimes fit more data on a printed page.

Choosing paper size

Choose the paper size and paper source. The options available here depend on the type of printer you're using.

Fitting all the data on a specified page size

The Fit to Print option allows you to fit data onto a specified paper size by enlarging or reducing the size of the data. You can use this option to make sure that certain report elements will be printed together and avoid wasting paper.

Always check the result of any settings you make here in the Print Preview window before printing.

Adjust To

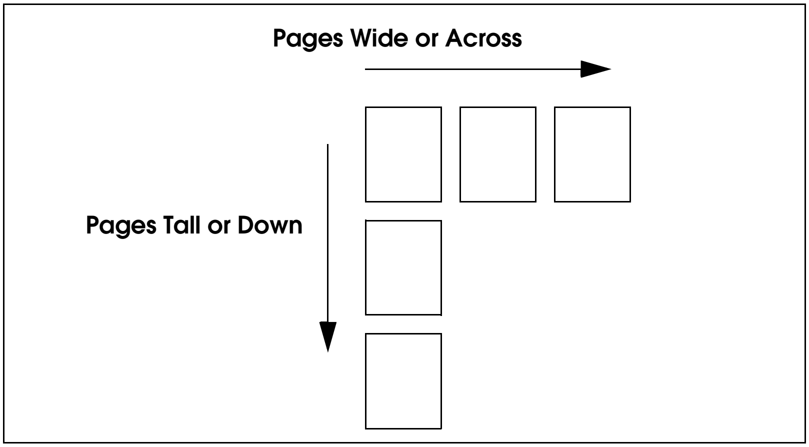
This option reduces or enlarges the printed report. You can enter values between 10 and 400. The normal size is 100%. To do this:

1. Click the Adjust To option button.
2. Type in a scaling percentage.

Fit To

This option allows you to reduce the printed report so that it fits on a specified number of pages. BUSINESSOBJECTS calculates the reduction it needs to fit the data on the specified number of pages. You can specify independent settings for printing width and height. To do this:

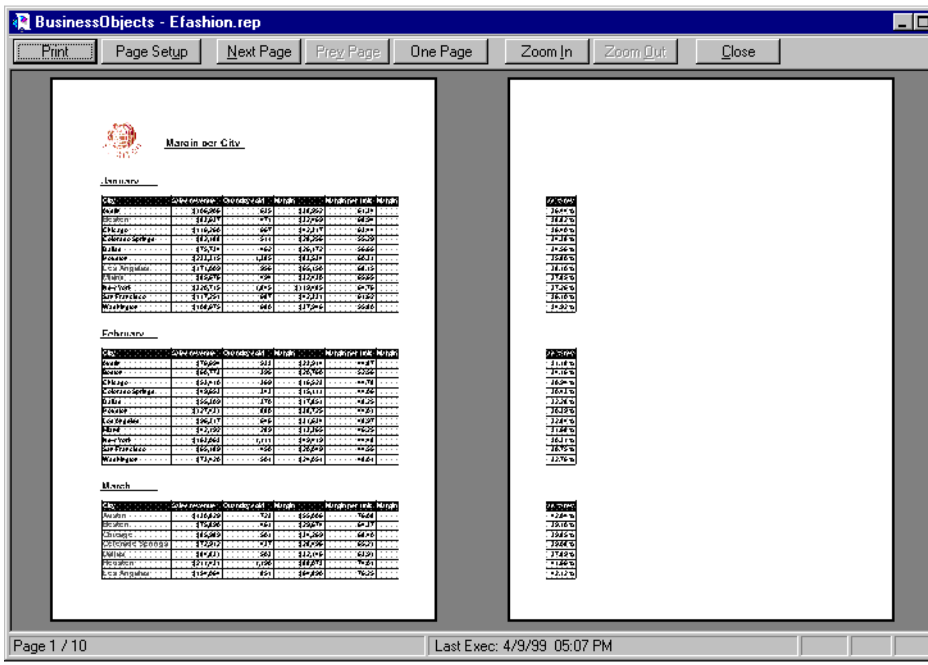
1. Click the Fit To option button.
2. Type in the number of pages Tall and Wide you want your report to print on.



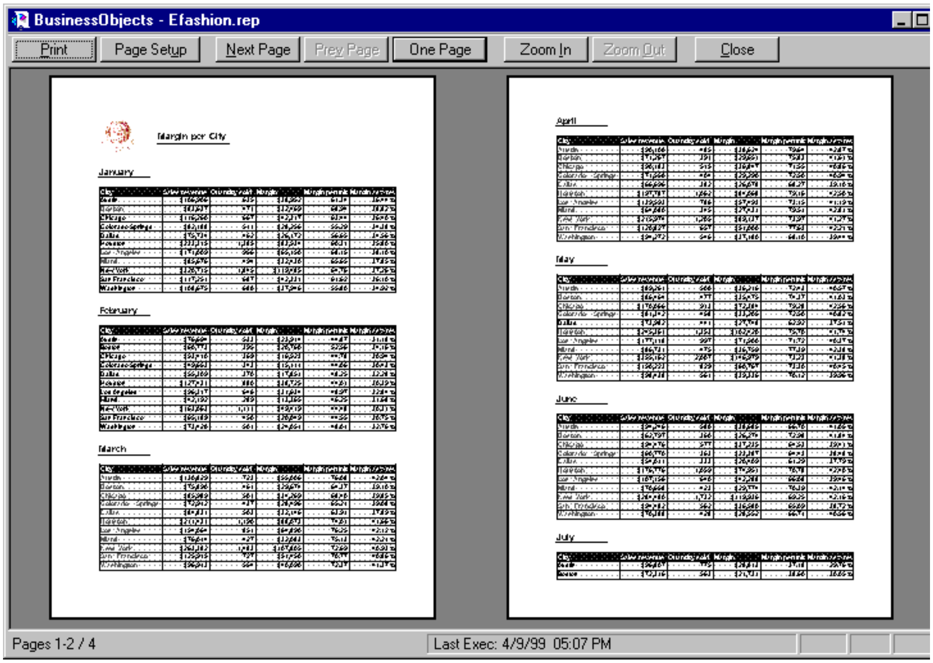
Note: The Fit To option cancels any Start New Page settings you've made in the Format Block dialog boxes.

Example **Printing two stray columns on the same page as the rest of the table**

When you look at your report in the print preview window, you realize that your report is two pages wide simply because you have one column of a table that has gone over onto the second page. This will not give a very satisfactory printed result, one stray column on a page.



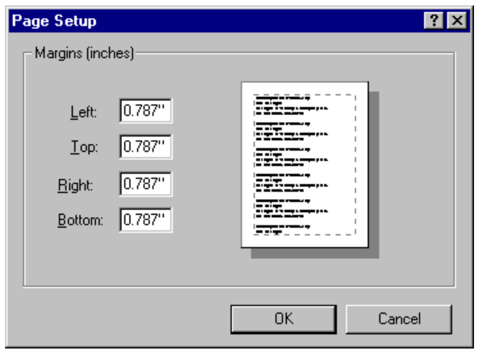
You can fix this by changing the settings in the Fit To Print section of the Page Setup dialog box. If you enter 1 in the Wide box, BUSINESSOBJECTS will reduce the overall width to fit the contents of the two pages on one page. However, since you haven't specified anything in the Tall box, BUSINESSOBJECTS will use the number of pages necessary to print the whole report.



Setting margins

When you view your report in print preview, you may notice that the current margins are either too big or too small. You can adjust the margin sizes directly from the print setup window. Remember that the minimum margins you can set are determined by the printer you are using.

1. Click the Margins button to open the Margins dialog box.



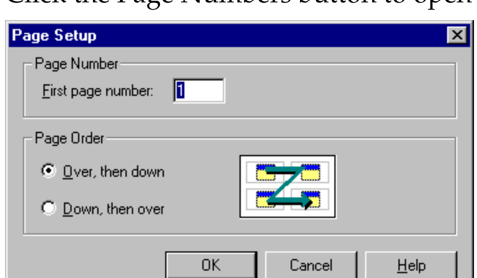
2. Type in sizes for the Left, Right, Top and Bottom margins, then click OK.

Note: You may be tempted to reduce the margins as much as possible to fit everything on the printed page. Keep in mind, however, that reports are often bound or stored in binders and you need to allow an adequate margin for this.

Setting page numbers

If you have inserted page numbers in your report, you can specify how page numbering will be handled.

- Click the Page Numbers button to open the Page Numbers dialog box.

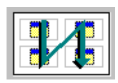


Setting start page number

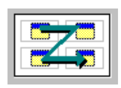
Type in the number you want to appear on the first page of the report to be printed. This is useful if the report is to be bound with other documents, or with reports printed from other documents.

Setting the page order for page numbers

When you have pages wide and tall in a report, you can control the order in which the pages are numbered.



- Check this option to number all pages down and then across.



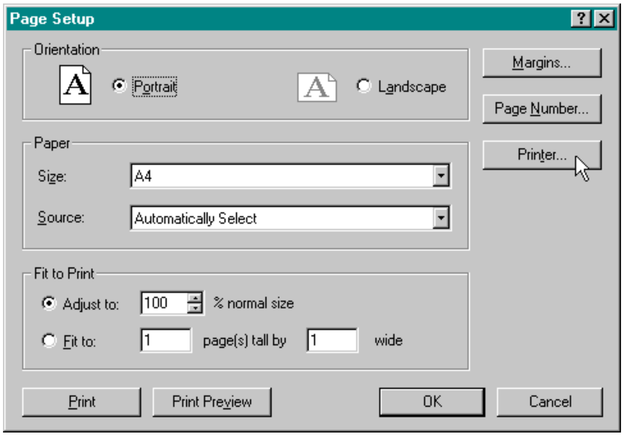
- Check this option to number all pages across and then down.

Note: Any formatting changes you make will be applied globally to all selected reports. If you don't want to lose the page settings already set up for individual reports, click Cancel.

Printing reports on different printers

You can print the different reports in your document on different printers. To do this:

1. Select the report tab of the report you want to set up.
2. Choose Page Set up from the File menu.
   The Page Setup dialog box appears.



3. Click Printer...
4. Choose the printer you want from the list of available printers and click OK.
5. Click OK to close the Page Setup dialog box, or click Print Preview to view the report, or click Print to print the report immediately.
   All three choices confirm the page settings and printer you have selected. These page settings are saved with the report.

Checking Pages in Print Preview

Print Preview displays how your printed pages will look. In Print Preview you can:

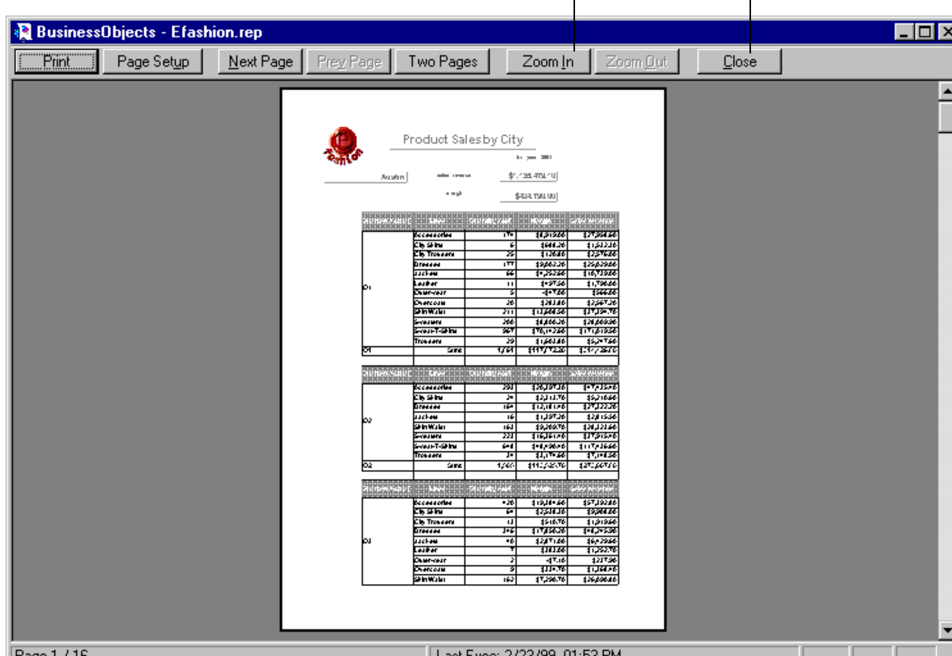
- Move easily between the pages of the report:
  - Click Next to go to the next page in the report.
  - Click the Prev button to go to the previous page in the report.
  - Click the Two Pages button to display two pages of the report at the same time.
- Go directly to the Page Setup dialog box to make any necessary adjustments and then back to the Print Preview window to see the result.
- Open the Print dialog box to print the report.

Print Preview

To preview a report before printing it, click the Print Preview button on the Standard toolbar.

Zoom in and zoom out buttons enlarge or reduce the display.

Closes the Print Preview window and goes back to the report window.



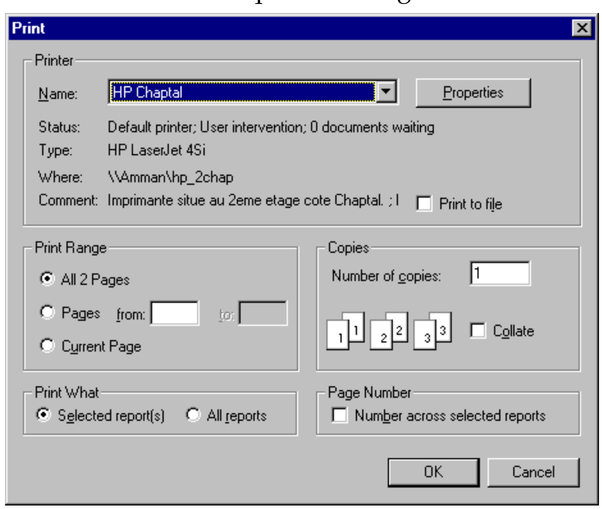
Printing

Once you've adjusted all your page settings, you are ready to print. You can print a single report, multiple reports, or all reports in a document.

To print a single report

By default, you will print the active report in your document. If the report you want to print is not the active report, select the report tab of the report you want to print.

1. From the File menu, choose Print.
2. The Print dialog box opens.
   You can check the page settings of the report. You can also make temporary changes to the page settings for this printout of the report. For example, you might want to change the target printer or paper size.
3. Check or make the required settings then click OK.



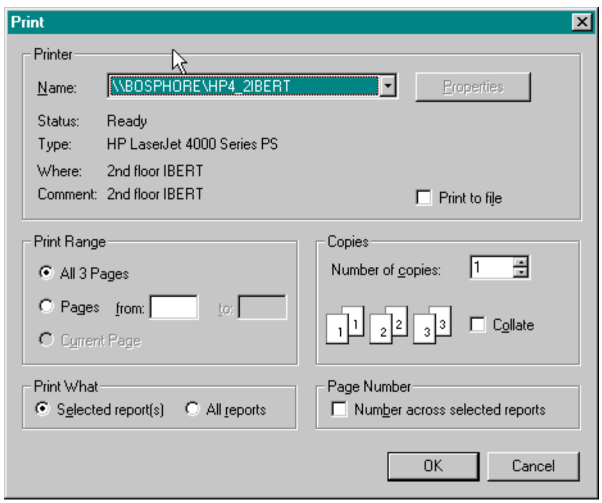
Changes you make in the Print dialog box will only apply to this printout. The page settings you make in Page setup are those saved with the report.

To print multiple reports

1. Click on the report tab of one of the reports you want to print.
   The name on the report tab is highlighted.

2. Holding down the Ctrl key, select the other reports you want to print.

3. From the File menu, choose Print.
   The print dialog box opens.



When multiple reports are selected, the Properties button is grayed out. This is to prevent you from overriding the different page orientations and paper sizes already set up for the individual reports.

4. Check or change the target printer or select a page range and click OK.

Tip: To modify the page settings for these reports, use the Page Setup menu. See "Setting up pages for printing" on page 326.

To print all reports in a document

1. From the active report, go to the File menu and choose Print.

2. Check All reports in the Print dialog box.

Using the Print button

Print

- Click the Print button on the Standard toolbar.

The selected report(s) will print directly without opening the Print dialog box.

Note: When you print multiple reports, whether using the Print dialog box or the Print button, all the selected reports will print to the printer targeted for the first report you selected. If you have specified different printers for individual reports in your document, you need to select and print the reports in batches by target printer.

Setting printing options

This section describes the options you can set in the Print dialog box.

Choosing which pages to print

Set the pages you want to print in the Print Range section:

Choose....	To...
All Pages	Print all the pages in the selected report or reports.
Pages From To	Print the range of pages you specify in the text boxes.
Current Page	Print only the page currently displayed on your screen. This option is only available if Page Layout view is turned on when you choose Print.

Setting which reports to print

Choose the reports you want to print from the current document in the Print What section:

Choose....	To...
Selected report(s)	Print all the selected reports.
All Reports	Prints all the reports in the current document.

Setting the number of copies of a report to print

Choose how many copies of a report you want to print and how the copies are printed:

Choose....	To...
Number of Copies	Type in the number of copies you want to print.
Collate	If you are printing more than one copy of a report, you can check the Collate box so that one complete copy of the report is printed before the first page of the next copy is printed.

Setting how page numbers print

Use this option to number all the pages printed in a print job from 1 to ?. You can use this option if you have several reports to print but you want them to be numbered as if they were just one document.

If you are printing....	Choose......
selected reports in a document	Number across selected reports
all reports in a document	Number across all reports

Note: You cannot view the result of this setting in Print Preview. This setting temporarily overrides any page number settings you may have made in the Page Setup dialog box. It is applied to the printout only and is not saved with the report.

Printing from Broadcast Agent

You can send documents to be printed from BROADCAST AGENT.

This allows you to print the same document to different printers, for example, one copy to the marketing department and another copy to sales. For more information on how BROADCAST AGENT can handle printing see "Printing a document on different printers" on page 266.

Note: The printer set up a report when it was created may not be connected to your machine. If this is the case, the report will print on the default printer of your machine.

Printing Documents Made in BusinessObjects 4.1

BUSINESSOBJECTS 5.x uses standard Microsoft fonts. BUSINESSOBJECTS 4.1 used fonts which are slightly different from standard Microsoft fonts.

If you're using documents created in BUSINESSOBJECTS 4.1, you can display and print data in the fonts used in BUSINESSOBJECTS 4.1 so that your reports retain the same look.

To do this:

1. From the Tools menu, choose Options.
   The Options dialog box is displayed.
2. Click the General tab.
3. Check the option *Print as BusinessObjects 4.1*.

Note: When you check or uncheck this option, you may need to minimize and then maximize the BUSINESSOBJECTS document window to see the change in the display.

A Word About Printers

To get the best possible printouts of your BUSINESSOBJECTS documents, bear the following points in mind:

- You cannot print BUSINESSOBJECTS reports on text-only and dot.matrix printers.
- If you are using a PostScript printer, make sure you are using the PostScript driver delivered with your printer.
- If you are using a PCL printer driver, you may need to make some color and font adjustments to obtain satisfactory printed reports.

Frequently Asked Questions

This section provides answers to some frequently asked questions about printing BUSINESSOBJECTS reports.

How can I print several reports in one document at one time, when each report has a different page setup?

You need to define the settings you want for each report in Page Setup before you print. From the File menu, choose Page setup. The settings you define in Page Setup will be applied to any reports you have selected. When you print multiple reports using the Print menu or the Print button, these page settings will be retained.

How can I specify the same page settings for several reports in one document at one time?

You can apply the same settings to multiple reports. To do this, use the Ctrl key to select the report tabs of the reports you want. From the File menu, choose Page setup. The settings you define in Page Setup will be applied to any reports you have selected. When you print multiple reports using the Print menu or the Print button, these page settings will be retained.

How can I ensure the best quality from my printer?

Print on a PostScript printer using the PostScript printer driver delivered with your printer.

How can I ensure that one of the reports in my document will print on a different printer?

You can select a specific printer for a single report in either the Print dialog box or the Page setup dialog box. To ensure that the report will print to the printer you have specified, you need to print this report separately. You can either use the Print button or the Print menu.

My document has five reports. How can I set up reports 3, 4, and 5 in my document to print to a different printer than reports 1 and 2?

First you need to select the target printer for the reports. To do this:

1. Select the report tabs of reports 3, 4, and 5 using the Ctrl key.
2. From the File menu, choose Page setup.
3. Select the printer you want for the selected reports, for example “Marketing Printer,” and click OK.

Now do the same for reports 1 and 2:

1. Select the report tabs of reports 1 and 2.
2. Choose Page setup to select the printer you want, for example “Finance Printer,” and click OK.

You need to print reports set up for different printers separately. So, in this example, you must print your document in two separate phases. First, select reports 3, 4, and 5 and click the Print button. Then, do the same to print reports 1 and 2.

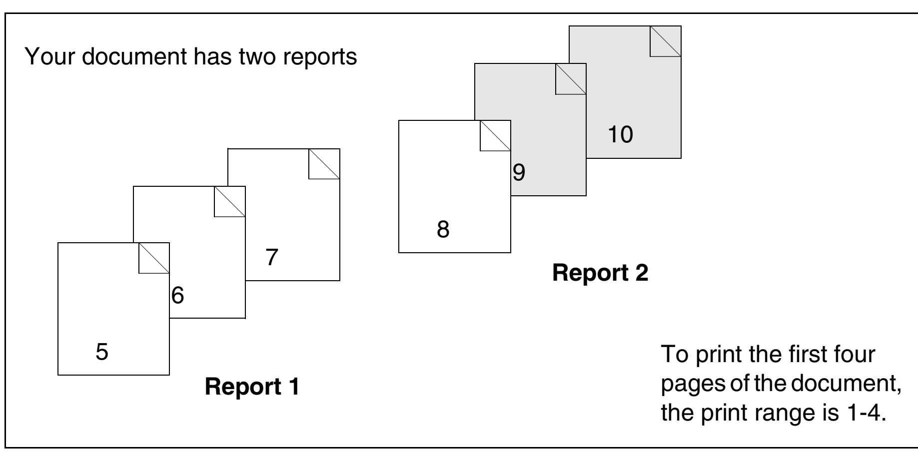
If I select three reports from my document for printing, what order will they print in and how will this affect the page numbering?

The reports will print in the order of the Report tabs in the document. For example, you want to print Report 1, Report 3, and Report 4 from a document. You select the reports in this order: Report 3, Report 4, Report 1. The order of printing is: Report 1, Report 3, Report 4.

How can I print multiple reports at one time and only print selected pages?

When you print multiple reports, you can opt to print a range of pages from the selected reports. You specify a start page number and an end page number in the Print Range section of the Print dialog box.

For example, your document has two reports. Using the Page Numbering option in the Page Setup dialog box, you have set the page numbering in Report 1 to start at page 5. If you open the File menu and select Print Preview, you can check how the page numbers will appear when your document prints. Report 1 displays page 5 on the first page and ends at page 7. Report 2 starts at page 8 and ends at page 10.



In this example, the first page of Report 1 counts as page 1 in the Print Range. The printed page number will appear as 5 on the printout.

You want to print all pages of Report 1 and just the first page of Report 2. To do this:

1. Choose Print from the File menu.
2. Type Pages from: 1 to: 4.
   The page numbers you enter in Print Range refer to the pages of the reports in the order of the report tabs in the document.

Appendix A Accessibility Options

In this appendix

Overview

This appendix describes the accessibility features, including the Universal Access Java applet, for INFOVIEW.

General Information

- INFOVIEW and WEBINTELLIGENCE have:
  - keyboard replacement of mouse actions
  - screen reader accessibility
  - high contrast colors
  - alternative descriptions for images
- Windows client and Internet Explorer Browser accessibility is fully supported.
- Charts are not available to screen readers. This includes bar, line, surface, area, pie, volume, doughnut, polar, and simple scatter charts.
- It is not necessary to activate the Universal Access Java applet to view and refresh reports.
- The keyboard options for creating and editing reports are located in Appendix B of the *WebIntelligence User's Guide*.

Navigation Options in InfoView

- When following instructions using keyboard commands, replace the mouse actions by using the tab key to navigate to the correct HTML link, then pressing Enter.
- The skip link option can be activated on any INFOVIEW page.
- In data tables the row and column headers are tagged so that they can be identified by assistive technology. Tables are read from left to right, top to bottom.

View/Refresh Navigation Options

Press	To
CTRL+ TAB	Tab between the frames.
TAB	Move through the values in the frame.

Configuring the Universal Access Java Applet

- To use the Universal Access Java applet shortcuts you only need:
  - JDK 1.3
- To use assistive technology, such as Jaws, you need to contact your System Administrator to configure your computer system. Installing JDK 1.3 will not be sufficient.

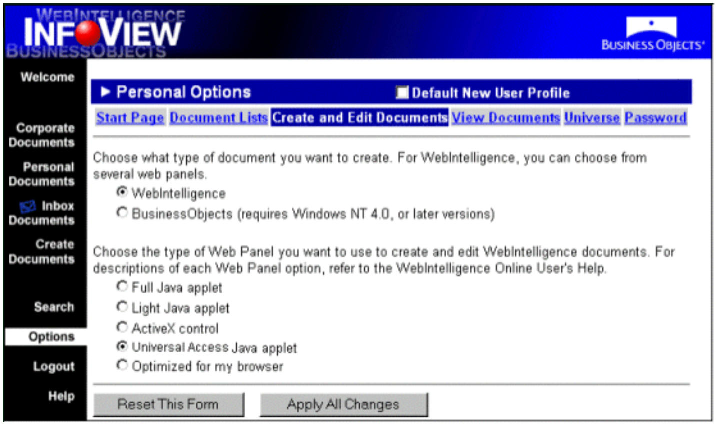
Activating the Universal Access Java Applet

Note: It is not necessary to activate the Universal Access Java applet to view and refresh reports.

The Universal Access Java applet, based on the Light Java applet, needs to be activated before you can use the accessibility features. Your system administrator makes the Universal Access Java applet available during installation.

To activate the Universal Access Java applet:

1. Select Options, Create and Edit Documents.
2. Select Universal Access Java applet, then click Apply All Changes.



Note: In order to use the Universal Access Java applet, you must have JDK 1.3 installed. If it is not, a page with a link to Sun web page appears. You can continue with the JDK 1.3 download or cancel the process.

Warning: This version of JDK may affect other applications. Contact your system administrator before proceeding with the download.

Applet Frame Navigation Options

To navigate from one frame to another:

Press	**To**
CTRL+ TAB	Tab between the applet frames, and the navigation and URL address bars.
TAB	Move between applet frames or select the first feature in a frame, which in the Results tab is the All Objects list box.

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